



External Affairs  
Canada

Affaires extérieures  
Canada



**BRUNEI**

**INDONESIA**

**MALAYSIA**

**PHILIPPINES**

**SINGAPORE**

**THAILAND**

# **EXPORTER'S GUIDE TO ASEAN**

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**1989**

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ASSOCIATION OF SOUTHEAST ASIAN NATIONS: A PROFILE

## ASSOCIATION OF SOUTHEAST ASIAN NATIONS: A PROFILE

### Historical Background

The Association of Southeast Asian Nations (ASEAN), comprising Indonesia, Malaysia, the Philippines, Singapore and Thailand, was formed in Bangkok in 1967. Brunei became the sixth member in January 1984. The original objectives of ASEAN as stated in the Bangkok Declaration were: (1) to accelerate economic growth, social progress and cultural development in the region, and (2) to promote regional peace and stability. A major ASEAN accomplishment, over the years, has been to moderate the antagonisms between the countries of the region. They have set aside the legacy of bitterness and hostility which had been manifest in regional disputes such as Indonesia's "Confrontation" with Malaysia, and the Philippines claim to the Malaysian state of Sabah.

In 1971, the Foreign Ministers of the five founding members of ASEAN signed the Kuala Lumpur Declaration calling for a Zone of Peace, Freedom and Neutrality (ZOPFAN), with the aim of keeping the region free from big power rivalries. The idea has re-emerged as an important objective of ASEAN in the wake of the communist successes in Vietnam, Laos and Cambodia in 1975. In February 1976, the first Summit meeting of the ASEAN Heads of Government was convened in Bali where they signed a Treaty of Amity and Cooperation which established mechanisms to resolve outstanding bilateral disputes. The importance of political consultations and economic cooperation was emphasized by the signing of the Declaration of ASEAN Concord, which established a framework for sustained consultations at various political and economic levels.

The second ASEAN Summit in Kuala Lumpur in 1977, reaffirmed the directions established at Bali. The Kuala Lumpur Summit also affirmed the importance of "Dialogues" being opened with Australia, New Zealand, Canada, Japan and the EC.

The third ASEAN Summit was held in Manila in December, 1987. The Manila Declaration gave new impetus to regional economic cooperation and approved amendments to the Treaty of Amity and Cooperation to facilitate greater contacts and cooperation between ASEAN and other countries, particularly within the Asia-Pacific region.

### Political Cooperation

It is in the area of political cooperation that ASEAN has had its most remarkable success. Regular meetings of Foreign Ministers, Economic Ministers and other senior political and government officials have been

institutionalized. ASEAN coordination now extends to activities in various international fora, such as the UN and the Non-Aligned Movement, as well as to the activities of ASEAN missions in foreign capitals.

Concerted action in the United Nations on such issues as Cambodia has led to consultations and even united action on a wide variety of issues of both direct and indirect interest to the members of the Association. For example, the ASEAN countries have worked at coordinating their response to Law of the Sea issues, they have taken common stands on a variety of commodity issues, and have worked together effectively within the GATT and on deliberations for the Uruguay MTN Round. They have also presented a coordinated view to the Economic Summits since 1984.

### Economic Cooperation

While ASEAN members have made great strides in political cooperation on bilateral, regional, and international political/security issues and broad economic matters, trade and commercial cooperation has been relatively modest. Progress in this latter respect has been slow since ASEAN economies are not complementary and, in many respects, members are competitors in the natural resources, agriculture, and fisheries sectors.

The Third ASEAN Summit took several steps to galvanize greater economic cooperation among members, with particular attention to the three high-profile schemes now in place: ASEAN Preferential Tariff Arrangements; ASEAN Industrial Joint Ventures; and ASEAN Industrial Complementation.

The basic feature of preferential tariff arrangements has been a commitment to exchange tariff preferences based on lists of products imported by member countries. Since its introduction in 1977, the PTA has grown to include over 20,000 items. However, the PTA scheme has not been successful in promoting intra-ASEAN trade as most significant items have been excluded. The Manila Declaration announced a 5-year plan to extend PTA coverage to 90% of total goods traded within the region and at least 50% of the value of total ASEAN-sourced imports. Other measures included an increase in preferential tariff rates and a commitment to "standstill and rollback" on tariff and NTBs affecting intra-ASEAN trade.

The ASEAN Industrial Joint Ventures scheme was amended to attract greater private sector interest, especially from foreign investors who may now possess 60% equity in AIJV projects, up from 49%. Other improvements included an increase

in tariff preferences for AIJV products and undertaking to introduce Investment Guarantee legislation to protect investments from appropriation or nationalization.

ASEAN industrial complementation has been designated by the governments as the private sector's contribution to economic cooperation. Various industry groups, working through the ASEAN Chamber of Commerce and Industry, have set up "industry clubs" (15 at present) to develop cooperative approaches designed to strengthen their joint commercial and industrial activities. In some cases this has led to the integration of the industry on an ASEAN-wide basis. Cooperation takes the form of harmonization of product standards and testing procedures, research and development, and coordination of investment projects so that ASEAN companies will not compete with each other. Again, progress has been very slow in the area of industrial complementation.

#### Administrative Structure

The 1976 Bali Summit created an ASEAN Permanent Secretariat in Jakarta, but it was given limited authority. The Secretary-General of ASEAN is responsible for administering the Secretariat but not the Association. Each country has its own national office of "Director-General, ASEAN" to handle ASEAN matters and collectively they form the ASEAN Standing Committee.

Five economic committees have been set up under ASEAN's economic ministers: Trade and Tourism (COTT); Industry, minerals and energy (COIME); Food, Agriculture and Forestry (COFAF), Finance and Banking (COFAB), and Communications and Transportation (COCT). There are also various sub-committees, working groups, ad hoc bodies and experts' groups. Decisions are taken by unanimous consent and the pace can be slow. Although this has disadvantages, it could hardly be otherwise in an association dependent on the full consensus of its membership.

Many local non-governmental bodies have federated to become ASEAN-wide organizations. Accordingly, there is an ASEAN Chamber of Commerce and Industry, an ASEAN Inter-Parliamentary Organization, an ASEAN Council on Petroleum (ASCOPE), a Confederation of ASEAN Journalists and an ASEAN Bankers' Association.

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**CANADA-ASEAN RELATIONS**

## CANADA-ASEAN RELATIONS

### BACKGROUND

Canada has sought, since the mid-seventies, to develop substantive relations with ASEAN in recognition of its positive contribution to the peace, stability and development of Southeast Asia and to strengthen bilateral links with ASEAN member states. Canada became a "dialogue partner" with ASEAN in 1977. In order to ensure a formalized contact point for each of its "dialogue partners" (Canada, Australia, the EEC, Japan, New Zealand and the United States), ASEAN designates a coordinating country on a rotating basis. Canada's current dialogue coordinator is Brunei.

A Canada-ASEAN Economic Cooperation Agreement was signed in September 1981, and came into effect in June 1982. Under the Agreement, a Joint Cooperation Committee (JCC) was established to review progress in various forms of commercial and development cooperation between Canada and the ASEAN multilateral grouping. The first JCC meetings have been held annually, alternating between Ottawa and ASEAN capitals. The fifth meeting of the JCC was held in Ottawa, April 7-8, 1988.

Since 1980, the SSEA has attended the annual ASEAN Foreign Ministers Post Ministerial Conference (PMC) in various ASEAN capitals. The conference focuses on regional and international economic and political issues of interest to ASEAN and the dialogue partner countries. It provides a unique opportunity for the SSEA to discuss evolving bilateral relationships with Foreign Ministers of ASEAN states.

### CANADIAN INTERESTS IN ASEAN

#### Security

From a strategic perspective ASEAN stands astride the vital sea lanes which link the Middle East and South Asia with the free market economies of the Western Pacific and North America. With an expanding volume of trans-Pacific trade, any disruption in the movement of goods in the region would be of direct significance to the ASEAN and Pacific countries such as Japan and Australia, which are among Canada's most important trading partners. Canada has consistently supported the ASEAN countries in their demand that Vietnam withdraw from Cambodia, thereby reducing regional tensions.

#### Political

The ASEAN nations, with their free market economies and open societies, are an attractive model to promote under the Asia-Pacific region and thus have been accorded strong

Canadian support. Various ASEAN countries are important members of OPEC, the Islamic conference, the Non-Aligned Movement, and, the Cairns Group. Canada's relations with ASEAN are complemented by such factors as the Commonwealth relationship with three of its members (Singapore, Brunei and Malaysia), major development assistance programs in Indonesia, Thailand, Malaysia and the Philippines, and the large number of immigrants from Southeast Asia in Canada. Canada's acceptance of some 110,000 Indochinese refugees since 1975 has earned Canada considerable credit with ASEAN governments.

#### Trade and Economic Relations

Canada's economic and commercial relationship with the Association of South East Asian Nations is strong and growing. Canada is a major importer of natural resources from ASEAN, and the steady growth of the economies of the ASEAN member countries offer excellent opportunities for Canadian suppliers. While two-way trade between Canada and ASEAN has tripled over the last decade, there remains tremendous potential for future growth as ASEAN and Canadian exports account for only approximately 1% of each others' markets.

Canada's two-way trade with ASEAN exceeded \$2 billion for the first time in 1988, amounting to \$2.65 billion, an increase of 33% over the 1987 figure. Canadian exports to the region increased by 27% to \$1,156 million, while imports increased 37% to \$1,492 million, leaving a balance on trade surplus to ASEAN of \$336 million.

In December 1986 the ASEAN-Canada Business Council was created jointly by the Canadian Chamber of Commerce and the ASEAN Chambers of Commerce and Industry to foster closer mutual understanding and promote closer business relationships between Canada and the six countries of ASEAN.

#### Development Cooperation

Until 1986, development cooperation had centered primarily on natural resource development and transfer of technology. Given the rapid growth in the economies of ASEAN, assistance has been evolving towards a greater emphasis on industrial cooperation and, more particularly, human resources development, an area where Canada is making a major initiative. In 1987, an ASEAN Human Resources Development Fund was established with funding of \$750,000 for study tours and training, primarily for government personnel. An ASEAN scholarship fund has also been established with funding of \$60,000 to permit approximately 30 person years of diploma and graduate training in Canadian educational institutions. Canada has also established an Canada-ASEAN Centre in Singapore to support and facilitate ASEAN-wide development cooperation activities.

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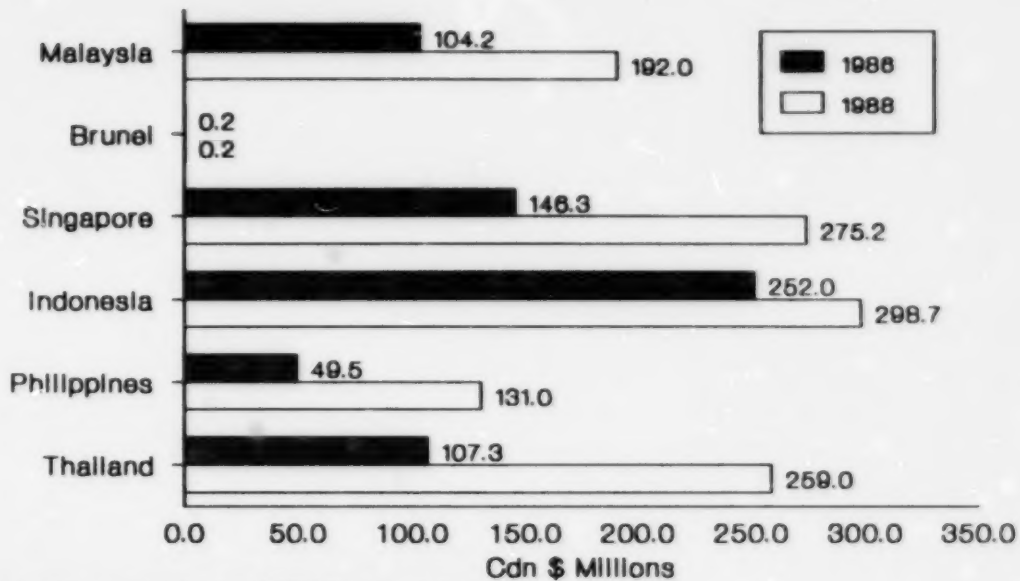
STATISTICS:

- CANADIAN EXPORTS TO ASEAN
- CANADIAN IMPORTS FROM ASEAN
- CANADIAN EXPORTS TO ASEAN BY MAJOR COMMODITY GROUP
- CANADIAN EXPORTS TO ASEAN BY PROVINCE OF ORIGIN

NOTE: IMPORTS SHOWN ARE BASED ON COUNTRY OF ORIGIN.  
HOWEVER, PRIOR TO 1988 IMPORTS WERE PUBLISHED BASED ON  
COUNTRY OF CONSIGNMENT/EXPORT.

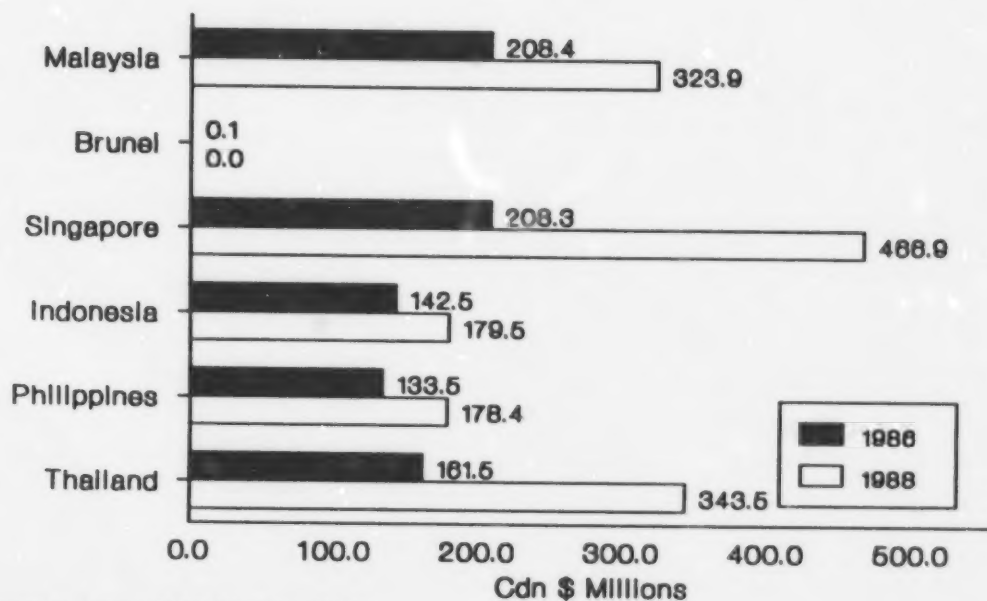


## Canadian Domestic Exports to ASEAN Countries, 1986 and 1988



**Domestic exports to ASEAN countries  
totalled Cdn \$ 1,156.2 million in 1988.**

## Canadian Imports from ASEAN Countries, 1986 and 1988



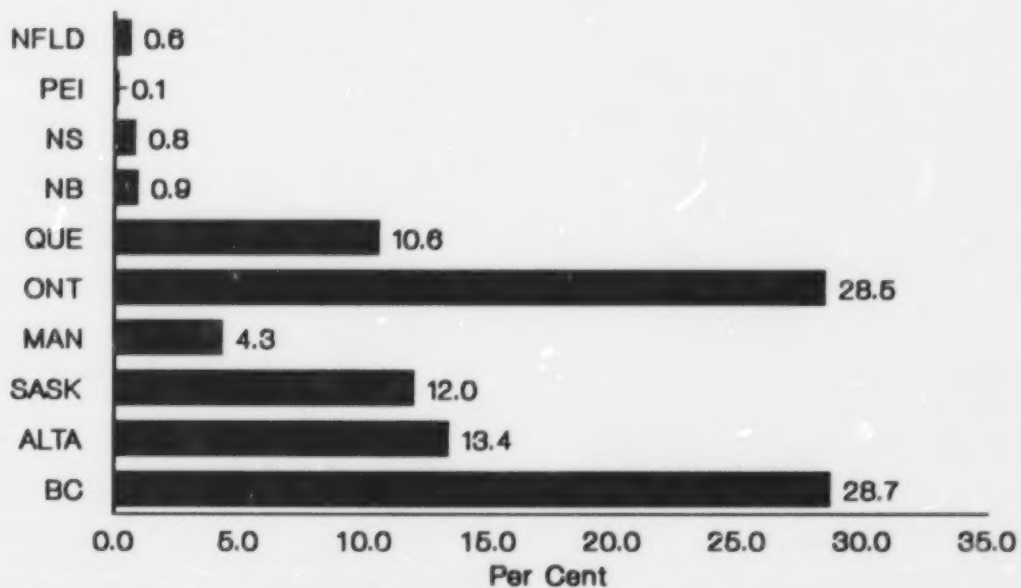
Imports from ASEAN countries  
totalled Cdn \$ 1,492.2 million in 1988.

## Canadian Domestic Exports to ASEAN Countries by Major Commodity Group

| <u>Major Commodity Group</u>                   | <u>1988</u>       |
|------------------------------------------------|-------------------|
|                                                | (Cdn \$ Millions) |
| Fertilizers                                    | 117.0             |
| Plastics                                       | 101.8             |
| Wood Pulp & Similar Pulp                       | 91.6              |
| Wheat                                          | 84.7              |
| Newsprint Paper                                | 58.6              |
| Aluminium, Incl. Alloys                        | 57.3              |
| Other Telecommunication &<br>Related Equipment | 42.4              |
| Asbestos                                       | 42.3              |
| Sulphur                                        | 40.1              |
| Precious Metals, Incl. Alloys                  | <u>35.8</u>       |
|                                                | 671.6             |

Represents 58% of Domestic Exports to ASEAN Countries

## Canadian Domestic Exports to ASEAN Countries by Province of Origin, 1988



Domestic Exports to ASEAN Countries  
totalled Cdn \$ 1,156.2 million in 1988

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BRUNEI



## BRUNEI DARUSSALAM

### GENERAL INFORMATION

Brunei is located on the island of Borneo and comprises an area of 5,765 square kilometers. The population of 227,000 is composed of Malays (65%), Chinese (20%) and Indigenous tribes (8%). Languages spoken include Malay, English and Chinese dialects. A British protectorate from 1888, Brunei refrained to join the Malay Federation in 1963 and became an independent Sultanate in 1984 at the expiration of its 140 year old treaty relationship with Britain.

### POLITICAL AND ECONOMIC SITUATION

Brunei is a Sultanate, ruled by His Majesty Sultan Sir Mudah Hassanal Bolkiah. The Sultan and two of his brothers, control all effective power between them. They are helped by a group of able western-educated technocrats. Traditional loyalty to the Royal Family and the Islamic faith provide cohesiveness within Brunei society. Although political parties are legal, only one has been formed and elections have not been held since 1962.

Brunei's citizens enjoy one of the highest per capita GDP in the world. The government also runs a \$2 billion surplus and reserves are unofficially estimated at US \$20 billion. Thus Brunei's only current economic problem is to find the best means to manage its wealth. However, efforts are being made through Brunei's fifth Five-year Development Plan (1986-90) to diversify economic activity away from over-dependence on oil and gas, to areas such as agriculture, forestry and financial activity. The GDP growth rate is estimated at 2.5-3% for 1987 and is expected to decline to 1% or 2% in 1988 due to lower oil prices.

### FOREIGN POLICY ORIENTATION

Brunei has diplomatic missions in London, the United States and in all capitals of the ASEAN countries. Brunei is a member of ASEAN, the Commonwealth, the Organization of the Islamic Conference and the United Nations, as well as the Islamic Development Bank's long term trade financing program. Brunei has not joined OPEC, but holds observer status. ASEAN membership is the number one priority in its foreign policy. Japan, (which imports 97% of Brunei's oil) and to a lesser extent Singapore, the USA, Britain and South Korea, are its main trading partners.

#### CANADA-BRUNEI RELATIONS

Canada-Brunei political relations received a strong start when Prime Minister Trudeau paid the first official visit to Brunei by a Foreign head of government in January 1983. Former International Trade Minister Regan represented Canada at Brunei's independence celebrations in February 1984 and diplomatic relations between the two countries were established in May 1984. Within the political context, Canada's bilateral relationship with Brunei is mainly pursued through the Commonwealth and ASEAN. Canadian banks, because of Brunei's large currency reserves, are also showing interest in the country and there may be opportunities to capitalize on diversification of Brunei's management of its financial assets. Education and human resources development also offer potential for increased bilateral relations. There are approximately one hundred Brunian students in Canada. Brunei participated in Expo '86 and the Sultan of Brunei came to Canada to attend the 1987 Commonwealth Heads of Government Meeting in Vancouver. The Canada-Brunei relationship will intensify rapidly during 1988-89. Brunei became in July 1988 Canada's dialogue coordinator with ASEAN. Moreover, the ASEAN Post-Ministerial Conference will be held in Bandar Seri Begawan in July 1989.

## BRUNEI DARUSSALAM

### TRADE OVERVIEW

Brunei's economy is dominated by the oil and liquefied natural gas industries and by Government. With the petroleum sector alone accounting for around 75% of the GDP, the most significant factor governing Brunei's economic growth is the state of the international oil market, not domestic economic activity. With the recent decline in oil prices, and with the government reducing oil production as a conservation measure from a high of 261,000 barrels per day in 1979 to 155,000 barrels per day in 1987, recent GDP growth performance has been poor.

The government employs 40% of the working population of Brunei. In 1987 government revenue (excluding investment income) was CDN \$1.7 billion, and expenditure was CDN \$1.5 billion. Estimated allocation of the government's expenditures in 1988 included 24% of the budget to the Armed Forces, 24% to Public Works, 15% to education and 7% to health.

Brunei has allocated CDN \$2.3 billion in its Fifth National Development Plan (1986-1990) to plans to diversify the economy. These funds will be allocated to the development of public utilities (CDN \$466 million), transport and communications (CDN \$466 million), industry and commerce (CDN \$233 million), public buildings (CDN \$233 million), and security (CDN \$233 million).

Canada's commercial success has been modest to date in Brunei. This has been in part due to the strong and longstanding British presence in Brunei, as well as to the small market size (227,000 population). With the current 5 year plan (1986-1991) at the halfway mark, many of the projects are either completed or well underway. Nonetheless, there are a number of areas which Canadian firms, willing to take a long term approach to doing business in Brunei, can pursue. These would include: oil and gas equipment and services, education and training, power generation equipment and services, defence and aerospace products and services.

### CANADIAN MARKETING OBJECTIVES

1. Oil and Gas Equipment and Services - The size of the market in this sector is estimated at \$50 million. Opportunities exist for Canadians in the area of consulting services and sales of process and control equipment.

2. Advanced Technology Products, Systems and Services - Commercial opportunities exist (in a market estimated at some \$35 million) in the area of telephones, telephone sub-station design and automated library systems.

3. Defence Programs, Products and Services - The market for these products and services is estimated at some \$250 million. There are good market prospects for Canadians in sales of surveillance and patrol equipment, radar and aircraft simulators. As we, Canadian suppliers may be interested in naval and military air base construction projects.

#### TRADE CONTACTS

Mr. Denis Comeau  
Counsellor (Commercial)  
Canadian High Commission  
IBM Towers  
80 Ansen Road  
SINGAPORE 0207  
(Mailing Address:  
Robinson Road  
P.O. Box 845  
Singapore 9016)

Telephone: (011-65) 225-6363  
Telex: (Destination Code 84)  
RS 21277  
Fax: (011-65) 225-2450

Mr. Roman Hruby  
Desk Officer - Brunei  
Asia Pacific South Trade  
Development Division (PST)  
Department of External Affairs  
L.B. Pearson Building  
125 Sussex Drive  
Ottawa, Ontario  
K1A 0G2

Telephone: (613) 995-7659  
Telex: 053-3745  
Fax: (613) 996-9510

NOTE: The High Commissioner in Singapore has responsibility for trade development efforts in Brunei.

**FACT SHEET - BRUNEI**

March 1989

**Area:** 5,765 sq km      **Population:** 226,000 (1986)

**Capital:** Bandar Seri Begawan      **System of Government:** (Monarchy) Sultanate

**Head of State:** Sultan Hassanal Bolkiah Mu'izzaddin Waddaulah

**Prime Minister:** Sultan Hassanal Bolkiah Mu'izzaddin Waddaulah

**Minister of Finance** (responsible for Trade): Prince Jefri Bolkiah

**Language:** Malay, English, Chinese      **Ethnic Background:** Malays 65%, Chinese 20%  
Indigenous tribes 8%, Indian & others 6%

**GDP:** (1987) US \$3.0 B      **Per Capita Income:** US \$15,400      **Currency:** Brunei Dollar on  
par with Spore \$= Cdn \$0.63

**Inflation Rate:** 7.6% (1986)      **Unemployment Rate:** N/A      **Debt Service Ratio:** Nil

**Major Trading Partners (Jan-Dec 1987):**

|                                              |                                              |
|----------------------------------------------|----------------------------------------------|
| <b>Exports</b> (Total: US \$1,796.2 million) | <b>Imports</b> (Total: US \$1,296.9 million) |
| 1. Japan (\$1.1 b)                           | 1. UK (\$0.37 b)                             |
| 2. Thailand (\$0.22 b)                       | 2. Singapore ((\$0.37 b)                     |
| 3. Korea (\$0.18 b)                          | 3. Malaysia (\$0.10 b)                       |
| 4. Singapore (\$0.11 b)                      | 4. USA (\$0.10 b)                            |
| 5. UK (\$0.05 b)                             | 5. France (\$0.08 b)                         |

**Canadian Trade Statistics: (Cdn \$ '000s)**

|         |             |             |
|---------|-------------|-------------|
|         | <u>1987</u> | <u>1988</u> |
| Exports | 37          | 232         |
| Imports | 192         | 37          |
| Balance | -155        | 195         |

**Main Sectors of Opportunity for Canadian Business:**

1. Technical education/training programs
2. Fisheries
3. Forestry
4. Communications
5. Electricity generation

**EDC Status:** on cover

**CIDA Status:** not programme country

**Resident Canadian Banks:** None

**Canadian Reps in Brunei:** (resident in Singapore)

High Commissioner - Sean Brady; Commercial Counsellor - Denis Comeau; Tel: (011-65) 225-6363; Telex: (Destination Code 87) RS21277; Fax: (011-65) 225-2450

**Department of External Affairs/PST Trade Contact:** Roman Hruby (613) 995-7659;  
Telex: 053-3745; Fax: (613) 996-9510

**Brunei Reps in Canada:** At the present time, contact should be made via Brunei  
Permanent Mission in New York

MAJOR CANADIAN EXPORTS TO BRUNEI  
(\$'000s)

|                                           | <u>1988</u> |
|-------------------------------------------|-------------|
| Special transactions, trade               | 168         |
| Oth. telecommunication & rel. equip.      | 18          |
| Television, radio sets & phonographs      | 17          |
| Office machines and equipment             | 10          |
| Bars and rods, steel                      | 6           |
| Oth. measur. cont. lab. med. & opt. eqpt. | 4           |
| Other special industry machinery          | 2           |
| Heating and refrigeration equipment       | 1           |
| Other equipment and tools                 | <u>1</u>    |
| Total                                     | 232         |

MAJOR CANADIAN IMPORTS FROM BRUNEI  
(\$'000s)

|                                         | <u>1987</u> | <u>1988</u> |
|-----------------------------------------|-------------|-------------|
| Outerwear, except knitted               |             | 30          |
| Other glass basic products              |             | 1           |
| Watches, clocks, jewellery & silverware |             | 1           |
| Other personal and household goods      |             | 1           |
| Other end products, inedible            |             | <u>1</u>    |
| Sub-Total                               |             | 34          |
| of                                      |             | —           |
| Total                                   | <u>191</u>  | <u>37</u>   |

Note: Imports shown are based on country of origin. However, prior to 1988, imports were published based on country of consignment/export.

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INDONESIA

## INDONESIA

### GENERAL INFORMATION

Indonesia is an archipelagic nation consisting of 13,000 islands stretching between the Indian and Pacific Oceans. It has a population of 176 million people of whom some 90 million are located on the island of Java. Indonesians consist of over 300 different ethnic groups speaking 250 distinct languages and dialects. The religion of the majority is Islam although pre-Islamic local beliefs and customs remain strong. Other important religions are Christianity and Hinduism. Indonesia continues to rank as one of the more successful developing countries. Under the leadership of the Soeharto Government it has enjoyed over two decades of political stability and steady economic growth, accompanied by a rising standard of living.

### POLITICAL AND ECONOMIC SITUATION

Indonesia has a complex republican form of government including an Advisory Council and Consultative Assembly and is heavily influenced by the traditional Javanese, and indeed Indonesian sense of respect for leadership and authority. The President has just been re-elected by acclamation for a fifth five year term of office. The new Cabinet appointments he subsequently made indicate that existing government policy directions will be maintained in economic liberalization measures and international relations.

The Indonesian economy is divided between a large, fragmented agricultural sector and a small, dynamic industrial sector. Indonesian industry has been fuelled by inexpensive domestic oil and is primarily oriented to satisfy a substantial domestic market. Import substitution has been the traditional emphasis of Indonesian industrialization while export earnings have come from the petroleum, forestry and minerals sectors. With the dramatic fall in prices of crude oil in the international market place and the concomitant fall in export revenues Indonesia has sought to diversify its exports and to strengthen the performance of non-oil production sectors. Various policies have been applied to achieve the desired results including a thorough reform of customs procedures, and a general liberalization of business and trading practices, which is still in process. These policies have proven to be effective: the share of non-oil export earnings grew to 60% of overall export earnings in 1988 lessening Indonesia's traditional reliance on oil exports.

Despite responsive economic policies foreign debt has risen sharply in recent years as the government borrowing for development projects in compensation for lower oil and gas export receipts. At the end of 1988 foreign debt is estimated at \$47 billion with a debt service ratio excess of 36%. Nonetheless Indonesia has managed to maintain a healthy foreign reserve position sufficient for approximately 9 months of imports. Indonesia's progressive and steady financial and fiscal policies have resulted in the country becoming one of the most credit worthy of developing nations. Access to

international loans has allowed the Government to adjust to international market fluctuations better than many other countries and to avoid the social and political stresses which have resulted from economic disruption and falling standards of living.

#### FOREIGN POLICY

Indonesia's foreign policy is characterized by a non-aligned stance with a pro-western tilt and constructive cooperation with neighbouring countries, especially ASEAN members. Indonesia was a founder of the Non-Aligned Movement (NAM). Since the mid-sixties it has leaned increasingly to the West both in political orientation and in economic and trade policies. It is a moderate and moderating participant in the Non-Aligned Movement (NAM), the Group of 77, the North-South Dialogue, the Islamic Conference and in various commodity groups including OPEC.

The Association of Southeast Asia Nations (ASEAN) is a paramount foreign policy consideration for Indonesia (the Secretariat is in Jakarta) and the degree of consultations among its members is increasingly reflected in Indonesia's position on various issues of common concern.

#### CANADA-INDONESIA RELATIONS

Canada has a continuing political interest in supporting governments which share a commitment to regional peace and stability in Southeast Asia. Indonesia's size, leadership role within ASEAN, importance as a moderating member of the Non-Aligned Movement, the Group of 77, OPEC and the Islamic Conference make it a country of increasing political importance to Canada. Furthermore, Indonesia and Canada share congruent interests across a number of international issues such as Cambodia, the Law of the Sea, North-South negotiations, commodities and regional security. In July 1985, the SSEA, accompanied by Maureen McTeer, paid a four-day visit to Indonesia and the Minister of International Trade, Pat Carney, visited in January 1988. The Indonesian Minister for Technology and Research, Dr. J.B. Habibie, visited Canada in August 1988. The first Parliamentary visit to Indonesia took place in February 1986. Foreign Minister Mochtar visited Ottawa February 16-18, 1987 as the guest of the Secretary of State for External Affairs, the Right Honourable Joe Clark. A second Parliamentary delegation visited Indonesia in November 1987.

Indonesia recognizes access to Canadian technology, finance and markets as a partial counterweight to the United States and Japan. Western (including Canadian) acceptance and support of President Soeharto's New Order and the resulting aid flow has provided a key political and economic boost to Indonesia. The development cooperation program with Indonesia constitutes Canada's third largest bilateral program in the world, with an indicative planning figure approaching \$300 million over the next five years. Emphasis is on human resources development and natural resources management.

## INDONESIA

### TRADE OVERVIEW

Indonesia's population of 176 million offers an enormous and relatively untapped market for Canadian products. Canadian engineering firms have been active in the country for many years implementing projects for the World Bank, the Asian Development Bank, and the Canadian International Development Agency, which devotes more than \$50 million annually to Indonesia as a country of concentration. These engineering firms have earned an outstanding reputation for Canada and have successfully created a number of important projects including the Bukit Asam coal project, the Suralaya power station, the Lombok irrigation project, etc.

Indonesia's imports in 1988 were estimated to be worth some US \$13.5 billion, of which perhaps \$1 billion were funded under assistance programs. Canada's share is 2 percent, at Cdn \$299 million in calendar 1988, generally through lack of appreciation of the opportunities awaiting suppliers.

There are important commercial opportunities which remain untapped by Canada, including a gas gathering system for new dual-fired power stations as well as potential turbine co-generation projects. There will also be continuing requirements in software, space, telecommunications, electrical switch gear, coal mining, ports, industrial chemicals, food products, packaging equipment, etc. Some of these opportunities will require the support of the Export Development Corporation if they are to be successfully pursued. EDC is responsive and understanding of Indonesia's financial condition and, whenever possible, will provide imaginative and supportive terms to assist Canadian exporters. The project market is sometimes considered to be "spoiled" through intense competition from Europe, Japan, USA, and Australia, but there is room for Canada if exporters will visit more frequently, develop an understanding of the market, and work closely with the Commercial Division at the Embassy, with EDC, and with CIDA. In 1988, there has been a particular campaign to bring the merits of the Indonesian market to the attention of Canada's exporters and improve Canada's access to an increasingly vital non-governmental market. This campaign will continue in 1989, for example, market studies on seven sectors will be available to exporters which will identify market opportunities.

### CANADIAN MARKETING OBJECTIVES

1. Oil and Gas Equipment and Services - The Government of Indonesia has announced its intention to exploit gas deposits as fuel for power. Therefore, opportunities exist to supply consulting and equipment.

2. Agriculture and Food Products and Services - Opportunities exist to expand Canadian food exports by better acquainting Indonesian importers and wholesalers with Canadian suppliers.

3. Mining, Metals and Minerals, Products and Services - Indonesian mining developments in gold, coal, and nickel are expanding rapidly, resulting in significant opportunities for consulting services, mining, and transportation equipment.

4. Power and Energy Equipment and Services - Over the next 10 years it is anticipated that generation capacity will increase by 380% with a corresponding growth in transmission and distribution capacity. Imports will fill the demand for large scale, high voltage, or high technology equipment as these are presently beyond the capabilities of domestic manufacturers. Canada has enjoyed strong performance in engineering services and the power boiler sector. The challenge is to maintain this market share and expand penetration to include possible new opportunities in turbo-electric and nuclear markets.

5. Industrial Machinery, Plant and Services - Canada has demonstrated ability to supply niche markets for industrial and production equipment. Increased importance will be placed on expanding the range of agencies covering this sector.

6. Communications and Informatics, Equipment and Services - The coming five year development plan, Repelita V, which begins on April 1, 1989, calls for the doubling of the Indonesian telephone network's existing capacity of 950,000 line units and involves an investment of about US \$3.5 billion. Canadian firms are actively promoting PBX, telex, satellite software, telecom training and management, and telecoms ancillary equipment. These firms are well accepted, and there is optimism that sales will be secured in 1989.

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**FACT SHEET - INDONESIA**

March 1989

**Area:** 1.9 million km<sup>2</sup>**Population:** 176 million (1988)**Capital:** Jakarta**System of Government:** Unitary Republic**Head of State:** (President) Soeharto**Minister of Trade:** Dr. Arifin Siregar**Language:** Bahasa Indonesia**Ethnic Background:** Indo-Malay 90%; Melanesian 5%; Others 5%**Religion:** Moslem 80%, Christian, Hindu & Others 20%**GNP:**(1987)US\$75.23 B **Per Capita Income:**US \$451(approx) **Currency:** New Rupiah Cdn\$1=1,400 Rp**Inflation Rate:** 7.9%(1988) **Debt Service Ratio:** 36% **Unemployment Rate:**18%-unofficial 1987**Major Trading Partners (1988):****Exports Total:** US \$19.2 billion (est.)**Imports Total:** US \$13.5 billion (est.)

1. Japan

1. Japan

2. USA

2. USA

3. Singapore

3. W. Germany

4. Korea

4. United Kingdom

5. Hong Kong

5. Singapore

**Canadian Trade Statistics: (Cdn \$ millions)**

|         | 1986           | 1987            | 1988            |
|---------|----------------|-----------------|-----------------|
| Exports | 240.9          | 305.1           | 298.7           |
| Imports | 142.5          | 193.1           | 179.5           |
| Total   | 383.4 (+ 98.4) | 498.2 (+ 112.0) | 478.2 (+ 119.2) |

**Major Canadian Exports (1988) (Cdn \$'000)**

|                                         |          |
|-----------------------------------------|----------|
| Wheat                                   | (55,753) |
| Wood pulp and similar pulp              | (49,475) |
| Syn. rubber & plastic materials         | (48,006) |
| Fertilizers & fertilizer material       | (30,729) |
| Sulphur                                 | (28,300) |
| Oils fats, waxes, extracts, derivatives | (19,343) |

**Major Canadian Imports (Cdn \$'000)**

|                               |          |
|-------------------------------|----------|
| Rubber & allied gums, natural | (57,537) |
| Plywood & wood bldg boards    | (42,375) |
| Outerwear, knitted            | (12,774) |
| Outerwear, except knitted     | (12,008) |
| Coffee                        | ( 6,789) |
| Oth. wood fab. materials      | ( 6,413) |

**Main Sectors of Opportunity for Canadian Business:**

- |                                                   |                        |
|---------------------------------------------------|------------------------|
| 1. communications (satcom, rural, remote sensing) | 3. transportation      |
| 2. power (thermal, hydro, nuclear)                | 4. advanced technology |

**EDC Status:** On cover**CIDA Status:** CORE country (Category I)**Resident Canadian Banks:** Hong Kong Bank of Canada**Canadian Reps in Indonesia:** Ambassador - Jack Whittleton; Commercial Counsellor - Doug Campbell; Tel: (011-62-21) 510709; Fax: (011-62-21) 578-2251; Telex: 62131 DOMCAN;**Department of External Affairs/PST Trade Contact:** John Clapp (613) 996-5824; Telex: 053-3745; Fax: (613) 996-9510**Indonesian Reps in Canada:** (Ottawa) Ambassador - Adiwoso Abubakur; Economic Counsellor - Bas Soetarto; Commercial reps: Ottawa, Toronto, and Vancouver; Customs Reps in Canada: SGS Supervision Services, Mississauga, Ont., Tel: (416) 670-0290; Fax: (416) 670-0142**Canadian-Indonesian Business Council:** World Trade Centre, 60 Harbour St., Toronto, Ont. M5J 1B7, Tel: (416) 863-2006; Fax: (416) 863-4830; Chairperson, Dr. Lorna Wright, c/o Queens University Kingston, Ontario, Tel: (613) 545-6296; Fax: (613) 545-2013

MAJOR CANADIAN EXPORTS TO INDONESIA  
(\$'000s)

|                                          | <u>1987</u>    | <u>1988</u>    |
|------------------------------------------|----------------|----------------|
| Wheat                                    |                | 55,753         |
| Wood pulp and similar pulp               |                | 49,475         |
| Syn. rubber and plastic materials        |                | 48,006         |
| Fertilizers and fertilizer material      |                | 30,729         |
| Sulphur                                  |                | 28,300         |
| Oils fats, waxes, extracts, derivatives  |                | 19,343         |
| Other paper                              |                | 14,170         |
| Zinc, including alloys                   |                | 11,827         |
| Organic chemicals                        |                | 6,203          |
| Oil seed cake and meal                   |                | 3,952          |
| Other telecommunication & rel. equip.    |                | 3,792          |
| Asbestos, unmanufactured                 |                | 3,215          |
| Special transactions, trade              |                | 2,099          |
| Textile and related fibres               |                | 1,987          |
| Oth. measur. cont. lab. med. & opt. eqp. |                | 1,561          |
| Metal fabricated basic products          |                | 1,547          |
| Newsprint paper                          |                | 1,363          |
| Paperboard                               |                | 1,295          |
| Heating and refrigeration equipment      |                | 1,267          |
| Aluminum, including alloys               |                | 1,249          |
| Other gen. purpose industrial mach.      |                | <u>1,126</u>   |
| Sub-Total                                |                | 288,259        |
| of                                       |                | <hr/>          |
| Total                                    | <u>305,079</u> | <u>298,691</u> |

MAJOR CANADIAN IMPORTS FROM INDONESIA  
(\$'000s)

|                                     | <u>1987</u>    | <u>1988</u>       |
|-------------------------------------|----------------|-------------------|
| Rubber and allied gums, natural     |                | 57,537            |
| Plywood and wood building boards    |                | 42,375            |
| Outerwear, knitted                  |                | 12,774            |
| Outerwear, except knitted           |                | 12,008            |
| Coffee                              |                | 6,789             |
| Other wood fabricated materials     |                | 6,413             |
| Broad woven fabrics, mixed fibres   |                | 4,741             |
| Other foods and materials for foods |                | 4,094             |
| Kitchen utensils, cutlery tableware |                | 3,215             |
| Other apparel and apparel access.   |                | 2,510             |
| Tin, including alloys               |                | 2,431             |
| Fish and marine animals             |                | 2,081             |
| Synthetic and reclaimed rubber      |                | 1,931             |
| Man-made fibre yarn and thread      |                | 1,926             |
| Other yarn and thread               |                | 1,746             |
| Broad woven fabrics, man-made       |                | 1,686             |
| Broad woven fabrics, cotton         |                | 1,513             |
| Tea                                 |                | 1,352             |
| Fruits and products, canned         |                | 1,112             |
| Footwear                            |                | 1,075             |
| Meat, fresh, chilled or frozen      |                | <u>1,046</u>      |
| Sub-Total                           |                | 170,355           |
| of                                  |                | <u>          </u> |
| Total                               | <u>193,062</u> | <u>179,502</u>    |

Note: Imports shown are based on country of origin. However, prior to 1988, imports were published based on country of consignment/export.

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**MALAYSIA**

## MALAYSIA

### GENERAL INFORMATION

The Federation of Malaysia consists of Peninsular Malaysia and the States of Sabah and Sarawak. The population of 17.0 million is composed of Malays (45%), Chinese (35%), Indians and Pakistanis (10.5%), indigenous tribes (9%) and others (0.7%). Malaysia is a parliamentary democracy with a Paramount Ruler (King or "Agong") elected for a five-year term by and from a group of nine hereditary Malay rulers from each state in Peninsular Malaysia.

### POLITICAL AND ECONOMIC SITUATION

Since the Federation of Malaysia was established, the country has been ruled by a strong coalition of ethnic parties, now called the National Front, the largest member of which was the United Malay National Organization (UMNO). Datuk Seri Dr. Mahathir Mohamad has been President of UMNO since 1981 and although he and his National Front Government were easily re-elected in April 1986, he was narrowly re-confirmed as Party President in April 1987. Following the challenge in court to Dr. Mahathir's leadership by a group of UMNO dissidents, it was ruled in February 1988 that UMNO was an illegal political organization due to certain registration irregularities. In August, the Malaysian Supreme Court dismissed an appeal by a group of former UMNO members which challenged the earlier High Court decision. A "New UMNO" party, under Dr. Mahathir's chairmanship has been organized.

Recent detentions without trial of parliamentarians and social activists, the closure of newspapers, and interference with the system of justice have attracted considerable negative publicity in Canada.

The Malaysian economy, like others in the ASEAN region is showing impressive real growth (4.7% in 1987) and is currently benefitting from the recovery in commodity prices worldwide and booming exports. Malaysia is highly dependent upon exports of primary products such as rubber, timber, tin and palm oil. GDP growth for 1988 is projected at 7.4%, well above earlier predictions. The fifth Malaysia Plan (1986-1991), announced in March 1986, has placed the onus on the private sector as the engine of future growth.

### FOREIGN POLICY ORIENTATION

Malaysian foreign policy priorities revolve around its participation in ASEAN, the Islamic Conference Organization, the Non-Aligned Movement and the Commonwealth. Malaysia initiated and has been active in promoting the concept of a "Zone of Peace, Freedom and Neutrality" in the Southeast Asian region. With Indonesia, it initiated the Kuantan Principle which attempted to draw Vietnam closer to the Southeast Asian grouping. Malaysia is

presently serving a term on the United Nations Security Council. Malaysia has been active in supporting producer country positions on international commodity issues. It is a leading member of two major commodity groups: the International Tin Council and the International Natural Rubber Organization. Finally, high priority has been given to the development of stronger economic links with Japan and Korea.

#### CANADA-MALAYSIA RELATIONS

Commonwealth links, Canada's strong interest and support for ASEAN and development assistance have been the principal features of the relationship between the two countries. Malaysia's election to the UN Security Council along with Canada will also likely foster closer cooperation in international affairs between the two countries. The bilateral aid program with Malaysia is modest (approximately \$5 million per year) and is focused on human resource development and institutional/industrial cooperation. Attracting Malaysian students to pursue their post-secondary education in Canada has more recently become a major factor in the relationship. There are approximately 3,500 Malaysian students currently studying in Canada, a substantial decrease from 6,000 a few years ago.

Trade between Canada and Malaysia is carried out under the General Agreement on Tariffs and Trade; Malaysia benefits from Canada's General Preferential Tariff in favour of developing countries. Canadian exports to Malaysia totalled \$192.0 million in 1988, while imports were valued at \$323.9 million. Bilateral relations between Canada and Malaysia were strengthened by the visit to Canada by Foreign Minister Rais as part of the Canada-Malaysia Conference in October 1986. Dr. Mahathir also came to Canada in September 1987 to attend the Commonwealth Heads of Government Meeting (CHOGM) held in Vancouver. Prime Minister Mulroney will attend the CHOGM hosted by Malaysia in October 1989. The recent appointment of a Canadian Forces Attache in Kuala Lumpur will help stimulate bilateral cooperation in the area of defence.

## MALAYSIA

### TRADE OVERVIEW

The strong performance of the Malaysian economy in 1988 has exceeded all projections, with real GDP growth expected to reach 7.4%. Per capital GNP stands at U.S. \$1,770, foreign exchange reserves exceed U.S. \$7.5 billion, inflation remains at less than 1%, and the debt service ratio has been reduced to 15%.

Of immediate interest to small and medium-sized Canadian firms is the indication that Malaysia imports CDN \$15 billion in goods to meet industry and consumer demand. Canada's share of the Malaysian market has historically been about 1%. Our technology, however, is comparable to our competition and in several sectors we are leaders. During 1988, both exports and imports continued to grow rapidly. Exports increased to \$192.0 million (from \$118.4 million in 1987), while imports reached \$323.9 million (from \$257.2 million). In 1988, total bilateral trade surpassed for the first time \$0.5 billion.

The challenge is to increase the quantity and diversity of the composition of Canadian export sales. This will require more aggressive marketing by Canadian industry, more effective local representation and stronger linkages with the Malaysian business community. Canadian firms will also need to consider joint ventures to penetrate the Malaysian and larger ASEAN market. Canada's investment advisor in MIDA can assist in locating good partners.

### CANADIAN MARKETING OBJECTIVES

The following sectors offer excellent potential for Canadian exporters:

1. Agriculture, Food Products and Services - Growing population, rising per capita income, and rapid urbanization have created a greater demand for food products which Malaysia continues to import (CDN \$1.4 billion annually). Foreign purchases will remain significant as will opportunities for sale of food processing equipment, technology and breeding stock and feed ingredients.
2. Oil and Gas Equipment and Services - Twenty production sharing contracts signed over the last two years are generating huge exploration investment in Malaysia. The 730 km peninsular gas pipeline project is dependent on the foreign supply of equipment and services. Downstream opportunities exist in development of commercial/residential infrastructure and the development of new refinery and petro-chemical projects is envisaged.

3. Advanced Technology Products and Services - The Government is dedicated to acquiring advanced technologies to enhance industrial development and modernize revenue generating operations. Power, telecoms, agriculture and petroleum activities are being computerized. Opportunities also exist in remote sensing and in upgrading broadcast facilities.

4. Power Equipment and Services - The National Electricity Board is proceeding with a program for extension and reinforcement of power transmission and distribution networks, system operation efficiency improvement projects, and plant conversions from oil to gas which offer good opportunities for Canadian consultants and equipment manufacturers. Development opportunities also exist in Sarawak and Sabah.

5. Defence Products - The Malaysian Ministry of Defence is embarking on a CDN \$2.5 billion security and defence equipment acquisition program.

6. Transportation Systems, Equipment - National Transportation Study (with involvement of Canadian consultants) being carried out to define development strategy and modernization programs for all transport modes. Prospects will exist for sale of transport equipment, services and technology. Privatization plans for railways, ports and airports will open up commercial opportunities.

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**FACT SHEET - MALAYSIA**

March 1988

**Area:** 329,744 sq. km.**Population:** 17.0 million (1988)**Capital:** Kuala Lumpur**System of Government:** Constitutional Monarchy**Head of State:** Yang di-Pertuan Agong, Sultan Iskandar**Prime Minister:** Dato Seri Dr. Mahathir Mohamad**Minister of Trade/Industry:** Datin Paduka Rafidah Aziz**Language:** Bahasa Malaysia, English,  
Chinese, Tamil**Ethnic Background:** Malay 50%, Chinese 33%,  
East Indian 10%, indigenous tribes 7%**GDP:** (1987) US \$26.8 B **Per Capita Income:** US \$1,850 **Currency:** Mlsian Ringgit = Cdn \$0.43**Inflation Rate:** 3.1%(1988) **Unemployment Rate:** 8.2%(1988) **Debt Service Ratio:** 16.8% (1988)**Major Trading Partners (1987):****Exports** (Total: US \$17.9 billion)

1. Japan \$3.5 b
2. Singapore \$3.2 b
3. USA \$2.9 b
4. S. Korea \$0.95 b
5. Netherlands \$0.62 b

**Imports** (Total: US \$12.7 billion)

1. Japan \$2.8 b
2. USA \$2.4 b
3. Singapore \$1.9 b
4. U.K. \$0.55 b
5. W. German \$0.54 b

**Canadian Trade Statistics: (Cdn \$ millions)**

|         | 1986    | 1987    | 1988    |
|---------|---------|---------|---------|
| Exports | 103.6   | 118.4   | 192.0   |
| Imports | 208.4   | 257.5   | 323.9   |
| Balance | - 104.8 | - 139.1 | - 131.9 |

**Major Cdn Exports** (Cdn \$'000)

1988

- Fertilizers & fertil. material (41,336)  
 Newsprint paper (22,372)  
 Oils fats, waxes, extracts, deriv. (13,853)  
 Aluminum, including alloys (13,772)  
 Wheat (12,158)  
 Asbestos, unmanufactured (9,626)

**Major Cdn Imports** (Cdn \$'000)

- Electronic tubes & semi-conductors (79,615)  
 Rubber and allied gums, natural (54,298)  
 Veg. oils & fats, exc. essential oils (24,381)  
 Televisions, radio sets & phonographs (22,456)  
 Outerwear, except knitted (14,955)  
 Fish and marine animals (14,580)

**Main Sectors of Opportunity for Canadian Business:**

1. Agriculture & food products & services
2. Oil and gas equipment and services
3. Advanced technology products & services
4. Power and energy equipment and services
5. Defence products
6. Transportation systems, equipment

**EDC Status:** on cover**CIDA Status:** Category II**Resident Canadian Banks:** Bank of Nova Scotia

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**Malaysia Reps in Canada:** High Commissioner - Tan Sri Datuk Thomas Jayasurya; Commercial Reps - Toronto

MAJOR CANADIAN EXPORTS TO MALAYSIA  
(\$'000s)

|                                           | <u>1987</u>    | <u>1988</u>       |
|-------------------------------------------|----------------|-------------------|
| Fertilizers and fertilizer material       |                | 41,336            |
| Newsprint paper                           |                | 22,372            |
| • Oils fats, waxes, extracts, derivatives |                | 13,853            |
| Aluminum, including alloys                |                | 13,772            |
| Wheat                                     |                | 12,158            |
| Asbestos, unmanufactured                  |                | 9,626             |
| Other telecommunication & rel. equipment  |                | 7,677             |
| Crude petroleum                           |                | 6,657             |
| Syn. rubber and plastic materials         |                | 6,415             |
| Wood pulp and similar pulp                |                | 6,106             |
| Other textile fabricated materials        |                | 5,563             |
| Zinc, including alloys                    |                | 4,715             |
| Other metals in ores, conc. and scrap     |                | 4,674             |
| Dairy produce, eggs and honey             |                | 4,573             |
| Organic chemicals                         |                | 4,197             |
| Other paper                               |                | 3,719             |
| Trucks, truck tractors and chassis        |                | 3,495             |
| Other oil seeds, oil nuts & oil kernels   |                | 2,036             |
| Office machines and equipment             |                | 1,560             |
| Other inorganic chemicals                 |                | 1,425             |
| Elect. lighting and dist. equipment       |                | <u>1,004</u>      |
| Sub-Total                                 |                | 176,933           |
| of                                        |                | <u>          </u> |
| Total                                     | <u>118,387</u> | <u>191,998</u>    |

MAJOR CANADIAN IMPORTS FROM MALAYSIA  
(\$'000s)

|                                        | <u>1987</u>    | <u>1988</u>       |
|----------------------------------------|----------------|-------------------|
| Electronic tubes & semi-conductors     |                | 79,615            |
| Rubber and allied gums, natural        |                | 54,298            |
| Veg. oil s & fats, exc. essential oils |                | 24,381            |
| Televisions, radio sets & phonographs  |                | 22,456            |
| Outerwear, except knitted              |                | 14,955            |
| Fish and marine animals                |                | 14,580            |
| Broad woven fabrics, mixed fibres      |                | 12,400            |
| Other elec. lighting distrib. equip.   |                | 12,149            |
| Outerwear, knitted                     |                | 12,007            |
| Other telecommunication & rel. equip.  |                | 10,601            |
| Other apparel and apparel access.      |                | 8,095             |
| Games, toys and children's vehicles    |                | 7,350             |
| Cocoa and chocolate                    |                | 6,694             |
| Other wood fabricated materials        |                | 5,706             |
| Switchgear and protective equipment    |                | 4,634             |
| Tin, including alloys                  |                | 4,472             |
| Telephone and telegraph equipment      |                | 2,928             |
| Stationer's and office supplies        |                | 2,793             |
| Footwear                               |                | 2,543             |
| Bars and rods, steel                   |                | 2,067             |
| Other end products, inedible           |                | 1,698             |
| Lumber                                 |                | 1,634             |
| Rubber fabricated materials            |                | 1,527             |
| Furniture and fixtures                 |                | 1,515             |
| Man-made fibre yarn and thread         |                | 1,372             |
| Other personal and household goods     |                | <u>1,103</u>      |
| Sub-Total                              |                | 313,573           |
| of                                     |                | <u>          </u> |
| Total                                  | <u>257,467</u> | <u>323,885</u>    |

Note: Imports shown are based on country of origin. However, prior to 1988, imports were published based on country of consignment/export.

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PHILIPPINES

## PHILIPPINES

### GENERAL INFORMATION

The Philippines is an archipelago of some 7,000 islands with a population of approximately 60 million. It has extensive natural resources in minerals, agriculture and fisheries, and a reasonably well trained industrial work force. The manufacturing and industrial base which was greatly weakened during the Marcos regime by financial irregularities and excesses, has demonstrated appreciable growth since the Aquino government came to power in February 1986, and future prospects are considerably brighter than a year ago. President Aquino and her government continue to enjoy widespread popularity and support.

### POLITICAL AND ECONOMIC SITUATION

Over the past three years the Aquino Government has demonstrated mixed results in addressing the principal issues facing the government and the nation. On one of the most urgent issues, land reform, Congress has passed legislation establishing the Comprehensive Land Reform Program which President Aquino has signed into law. However progress in implementing this program has been slow due to the complexities of land-holdings, entrenched interests, and financing.

In the area of human rights the government record has been disappointing. The cycle of abuses by various groups on the right and on the left continue unabated. The government has not demonstrated the political will to address this issue and the Commission on Human Rights has been essentially dormant. Recently, however, the government has established a new committee to address specifically the protection and preservation of human rights and to better monitor violations.

The New Peoples Army, the military wing of the Communist Party, continues to be an active insurgency movement, notwithstanding a number of recent successes by the Armed Forces against district headquarters and safehouses in Manila which have uncovered a large quantity of strategically useful information. Another major insurgency movement facing the government is that of the Muslim autonomy movement in the southern islands. Negotiations are moving slowly and this remains a contentious problem.

On the positive side the performance of the economy has rebounded dramatically from the excesses and depredations of the Marcos regime, achieving a growth rate of 5.7% in 1987 and 6.7% in 1988. This growth, while initially driven by public sector spending, moved into a consumer spending phase from which it is now moving into an investment led phase. This is an encouraging development as continued investment, especially foreign investment, is essential to long term economic growth. The current investment pattern is promising, consisting as it does of some 20% foreign investment. This reflects the success of the Aquino government in maintaining political stability and in inspiring investor confidence. The government must continue

to maintain a stable environment as it implements business, industrial and investment liberalization measures, if it is to sustain recent levels of economic growth and manage the servicing of a substantial foreign debt.

#### FOREIGN POLICY

While the Philippines retains close ties to the United States it is a full and integral member of the Association of Southeast Asian Nations (ASEAN), a regional grouping which has demonstrated a strong cohesiveness and commonality of political purpose over the past twenty years. ASEAN as a regional body, and its member nations are supportive of general western interests in international fora, sharing a number of views with Canada on such matters as trade liberalization measures, peace and disarmament, and Law of the Sea interests. While moving increasingly towards a non-aligned posture, the government recognizes the importance of Japan, the United States, and western donors in assisting with economic recovery and political stability.

#### CANADA-PHILIPPINES RELATIONS

Canadian relations with the Philippines, bilaterally and in the context of ASEAN, are strong. Canada was one of the first countries to recognize the new Aquino government and was the first country to extend export credits to the new government (through the EDC). Canadian interest in the Philippines is high in part because of the large Filipino-Canadian community numbering approximately 130,000 and in part due to the tremendous goodwill that President Aquino has engendered internationally.

Following a visit by the Secretary of State for External Affairs, the Right Honourable Joe Clark in July 1986, Canada approved an allocation of \$100 million over five years in development assistance funding. Subsequently the Philippine Minister of Education Quisumbing, Human Rights Commissioner Aportadera, and Commissioner of Good Government Diaz each visited Canada. Canadian visitors to the Philippines have included Senator Alistair Graham, a Parliamentary delegation led by the Honourable Steve Paproski last November, a parliamentary working group on security affairs in February 1988, and Chief of Defense Staff, General P.D. Manson in December 1987.

The Government of Canada re-affirms its support on all suitable occasions for the Government of the Philippines as it addresses social and economic reform issues, liberalizes the economic environment, and strengthens democratic process and institutions.

## PHILIPPINES

### TRADE OVERVIEW

The past year has seen considerable improvement in the stability of the Aquino government. Pressure from the extreme left and right is declining and the Government of the Philippines (GOP) is increasingly able to focus on its own agenda. They have been largely successful in dismantling monopolies in key industries and have made some progress in asset privatization and debt to equity swaps. However, they have yet to achieve any significant results in the controversial land reform plan.

The GNP is growing at an annual rate of over 6%, the highest in a decade, but it is still being fueled largely by consumer spending. Foreign and domestic investment, however, has increased from US\$180 million in 1986, to US\$400 million in 1987, to a projected US\$1 billion in 1988. Following a year of virtually no inflationary pressure, inflation is running at 9%. Lending rates now top 16%, up 3% from 1987. In response to strong pressure from the IMF, the Government of the Philippines (GOP) is persisting in its import liberalization efforts. Exports were up considerably in the first nine months of 1988 (US \$5.1B), but imports were increasing even faster (US\$6.1B) causing a widening trade deficit. International reserves have fallen uncomfortably low from a high of \$2 billion in December 1987 to \$1.6 billion (only two months of exports) nine months later. The debt issue continues to plague the economy. About 40% of the GOP budget and almost half of export earnings are devoted to debt service.

The country continues to rely heavily on foreign aid flows. In addition to World and Asian Development Bank funding and regular bilateral aid programs, the major aid donors are considering a new multinational aid program of over US\$1 billion annually. The Japanese are expected to announce a new OECF concessional loan package valued at over US\$800 million.

Overall, while economic difficulties remain, potential for Canadian exports has improved greatly. Canadian exports in 1987 reached C\$122 million which represents a 147% increase over the 1986 level and also an increasing share of the Philippine market. In 1988 exports grew by 7% to \$131 million while imports increased by 34% to \$178.4 million.

The Asian Development Bank (AsDB), with lending commitments of over \$2 billion annually, offers tremendous opportunity for Canadian exporters in the Asia-Pacific region. Canada's share of AsDB funded procurement in 1987 reached C\$17.2 million, of which \$10.7 million was contracted for goods, related services and civil works, and \$6.5 million was for consulting services. The Canadian Embassy in Manila has a full time Trade Commissioner dedicated to the service of the Canadian business community in pursuing projects financed by the AsDB.

## CANADIAN MARKETING OBJECTIVES

1. Power and Energy - Because of serious power shortages (caused by mothballing of nuclear plant and increasing demand), this sector enjoys the highest priority of the government. Many projects on the horizon are attracting I.F.I. and bilateral export and aid financing.
2. Communications and Informatics - A major expansion of the telecommunications network is underway. A public law was recently passed to provide for telephone service to all communities in the Philippines by 1992. A CIDA/EDC soft line of credit of \$42 million should be in place by early 1989.
3. Agriculture and Food Products - Import liberalization has created an expanded market for a wide variety of food products. There is continued potential for sales of swine, milk powder, urea, potash and fertilizer, and good scope for sales of food processing equipment.
4. Grains and Oilseeds - Despite the US Export Enhancement Program (EEP), buyers continue to favour Canadian wheat when the price differential is not too high. We have recently succeeded in penetrating the market for barley and canola, and there is good potential for ongoing sales. There is high interest in Canadian grains/oilseed for animal feed.
5. Mining, Metals and Minerals - Increased metal prices and improved stability of government have substantially enhanced prospects for the mining sector and mining investment. There is excellent potential for Canadian sales of equipment.

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**FACT SHEET - PHILIPPINES**

March 1989

**Area:** 300,439 sq km **Population:** 60 million (1988) -15th most populous country**Capital:** Manila**System of Government:** Democracy**President:** President Corazon Aquino**Vice President:** Salvador Laurel**Minister of Trade and Industry:** José Concepcion Jr.**Language:** Tagalog, (English Widely spoken)**Ethnic Background:** Mainly Malay, Chinese, also Indians, Japanese, Arabs, Spanish**GDP:** US 32.5 B (1987) **Per Capita Income:** US \$570 (1987) **Currency:** peso = Cdn 6.3¢**Inflation Rate:** 9.5% (1988) **Unemployment Rate:** 10.6% (1987) **Debt Service Ratio:** 30.5**Major Trading Partners (1987):****Exports (Total: US \$5.6 billion)**

1. USA (\$2.1 b)
2. Japan (\$0.98 b)
3. Netherlands (\$0.31 b)
4. W. Germany (\$0.29 b)
5. Hong Kong (\$0.28 b)

**Imports (Total: US \$6.9 billion)**

1. USA (\$1.5 b)
2. Japan (\$1.1 b)
3. Kuwait (\$0.33 b)
4. Hong Kong (\$0.30 b)
5. W. Germany (\$0.28 b)

**Canadian Trade Statistics: (Cdn \$ millions)**

|         | 1986   | 1987   | 1988   |
|---------|--------|--------|--------|
| Exports | 49.5   | 122.1  | 131.0  |
| Imports | 133.5  | 132.8  | 178.4  |
| Balance | - 84.0 | - 10.7 | - 47.4 |

**Major Cdn Exports (\$Cdn '000) 1988**

|                                 |          |
|---------------------------------|----------|
| Fertilizers & fert. material    | (21,668) |
| Syn. rubber & plastic materials | (10,976) |
| Wheat                           | ( 9,602) |
| Dairy produce, eggs and honey   | ( 9,150) |
| Wood pulp & similar pulp        | ( 8,372) |
| Paperboard                      | ( 7,731) |

**Major Cdn Imports (\$Cdn '000) 1988**

|                                         |          |
|-----------------------------------------|----------|
| Electronic tubes & semi-conductors      | (29,236) |
| Outerwear, except knitted               | (22,168) |
| Other apparel & apparel access.         | (16,147) |
| Outerwear, knitted                      | (11,818) |
| Fish and marine animals                 | (11,506) |
| Watches, clocks, jewellery & silverware | ( 9,712) |

**Main Sectors of Opportunity for Canadian Business:**

1. Power
2. Communications & informatics
3. Agriculture & food products
4. Grains and oilseeds
5. Mining, metals & minerals

**EDC Status:** on cover**CIDA Status:** Category I country (\$100 million program to be spent in 5 years)**Resident Canadian Banks:** Bank of Nova Scotia (Equity participation)**Canadian Reps in the Philippines:** Ambassador - Russell Davidson; Commercial Counsellor - David McNamara; Tel: (011-63-2) 815-9536; Telex: (Destination Code 75) 63676 DOMCAN PN; Fax: (011-63-2) 815-9595**Department of External Affairs/PST Trade Contact:** Louise Branch (613) 995-7680; Telex: 053-3745; Fax: (613) 996-9510**Philippines Reps in Canada:** Ambassador - (To be announced), Ottawa, Consulates in Vancouver and Toronto

MAJOR CANADIAN EXPORTS TO THE PHILIPPINES  
(\$'000s)

|                                        | <u>1987</u>    | <u>1988</u>       |
|----------------------------------------|----------------|-------------------|
| Fertilizers and fertilizer material    |                | 21,668            |
| Syn. rubber and plastic materials      |                | 10,976            |
| Wheat                                  |                | 9,602             |
| Dairy produce                          |                | 9,150             |
| Wood pulp and similar pulp             |                | 8,372             |
| Paperboard                             |                | 7,731             |
| Textile and related fibres             |                | 7,296             |
| Zinc, including alloys                 |                | 7,251             |
| Other paper for printing               |                | 3,634             |
| Other paper                            |                | 3,634             |
| Oil seed cake and meal                 |                | 3,601             |
| Iron ores and concentrates             |                | 3,412             |
| Other foods and materials for food     |                | 2,687             |
| Other telecommunication & rel. equip.  |                | 2,203             |
| Other inorganic chemicals              |                | 1,961             |
| Organic chemicals                      |                | 1,872             |
| Aluminum, including alloys             |                | 1,577             |
| Sulphur                                |                | 1,414             |
| Sugar and sugar preparations           |                | 1,358             |
| Medicinal & pharm. products, in dosage |                | 1,342             |
| Other chemical products                |                | 1,296             |
| Other end products                     |                | 1,177             |
| Drilling, excavating, mining mach.     |                | 1,151             |
| Plate, sheet and strip, steel          |                | <u>1,037</u>      |
| Sub-Total                              |                | 115,402           |
| of                                     |                | <u>          </u> |
| Total                                  | <u>122,095</u> | <u>131,016</u>    |

MAJOR CANADIAN IMPORTS FROM THE PHILIPPINES  
(\$'000s)

|                                         | <u>1987</u>    | <u>1988</u>    |
|-----------------------------------------|----------------|----------------|
| Electronic tubes & semi-conductors      |                | 29,236         |
| Outerwear, except knitted               |                | 22,168         |
| Other apparel and apparel access.       |                | 16,147         |
| Outerwear, knitted                      |                | 11,818         |
| Fish and marine animals                 |                | 11,506         |
| Watches, clocks, jewellery & silverware |                | 9,712          |
| Veg. oils & fats, exc. essential oils   |                | 8,235          |
| Fruits and products, canned             |                | 7,123          |
| Furniture and fixtures                  |                | 5,965          |
| Nuts, except oil nuts                   |                | 5,920          |
| Electronic computers                    |                | 5,322          |
| Other personal and household goods      |                | 4,736          |
| Footwear                                |                | 4,474          |
| Other end products, inedible            |                | 3,757          |
| Games, toys and children's vehicles     |                | 3,351          |
| Coffee                                  |                | 3,284          |
| Other wood fabricated materials         |                | 3,119          |
| Other fruit juices and concentrates     |                | 2,558          |
| Lumber                                  |                | 1,759          |
| Other metals in ores, conc. and scrap   |                | 1,429          |
| Other telecommunication & rel. equip.   |                | 1,428          |
| Other chemical products                 |                | 1,407          |
| Other textile fabricated materials      |                | 1,391          |
| Other fruits and fruit preparations     |                | 1,098          |
| Sporting and recreation equipment       |                | 1,089          |
| Televisions, radio sets & phonographs   |                | <u>1,037</u>   |
| Sub-Total                               |                | 169,069        |
| of                                      |                |                |
| Total                                   | <u>132,799</u> | <u>178,351</u> |

Note: Imports shown are based on country of origin. However, prior to 1988, imports were published based on country of consignment/export.

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SINGAPORE

## SINGAPORE

### GENERAL INFORMATION

Situated at the tip of the Malay Peninsula, the island of Singapore and 54 adjacent islets constitute the Republic of Singapore, encompassing a total land area of 622 square kilometers. The country's population is predominantly Chinese (76%) with Malays, Indians and a variety of other ethnic groups making up the balance. Singapore is a parliamentary democracy.

### POLITICAL AND ECONOMIC SITUATION

Singapore has been an independent republic since its separation from Malaysia in 1965. Although the Head of State is President Wee Kim Wee, executive power rests with the Prime Minister and his Cabinet. The People's Action Party (PAP) under Lee Kuan Yew, has won every general election since 1959, although the percentage of the party's popular vote dropped from 75% to 62% in the last three elections (1980, 1984 and 1988). The Party is presently undergoing a period of transition characterized by the arrival of a new generation of leaders and the likely accession of first Deputy Prime Minister Goh Chok Tong to the premiership within the next two years. It is generally recognized that Singapore's emergence as a dynamic trade and economic centre for Southeast Asia has been the result on the PAP's social and economic policies.

With no natural resources, Singapore has developed on the basis of an industrious labour force and a vital geographic location. Government objectives are to ensure Singapore's development as the foremost financial, communications and transportation services centre in the region. After real growth dropped to -1.8% in 1985, the government began pursuing a number of strategies to turn around this uncharacteristic performance, including cuts in property, corporate and personal taxes and increased public spending. In response to healthy external and internal demand and as a result of government measures, real growth reached a spectacular 8.8% in 1987 and, following exceptional growth rates in the first three quarters of 1988, the government increased its growth forecast for 1988 to above 10%, up from earlier predictions of 6-7%. The problem of labour shortages has become associated with this dynamism and the government is addressing the resulting pressures in the interest of Singapore's international competitiveness and long term economic growth. GDP growth is expected to slow down to 7% in 1989.

### FOREIGN POLICY ORIENTATION

Singapore's foreign policy is pragmatic. Its perception of issues is based primarily on the assessment of their relevance to the economic development of Singapore. Given its size, Singapore, as a member of ASEAN, has much to gain from the strengthening of the organization mechanisms to deal with

international and regional political developments. As a nation depending extensively on international financial, commercial and trading relationships, issues such as protectionism, the international debt crisis, low commodity prices, the availability of investment funds and volatile oil prices are all of crucial interest to Singapore.

In both economic and political terms, Singapore has assumed an importance which belies its size. In international organizations, such as the UN, the IMF or GATT, Singapore has established a reputation for the reasonableness and moderation it has brought to bear on positions adopted by developing country groups. It is often the most forceful and articulate spokesman for ASEAN.

#### CANADA-SINGAPORE RELATIONS

Canada enjoys sound, if somewhat limited, relations with Singapore as a result of the Commonwealth bond, a similar outlook on international problems and Canada's support for ASEAN. Canadian exports to Singapore totalled \$275.2 million in 1988, compared to imports of \$466.9 million. Bilateral agreements cover investment, double taxation and EDC financing through the five major Canadian banks, which are all represented in Singapore. Trade between Canada and Singapore is conducted under the rules of the GATT. Singapore is a beneficiary of Canada's General Preferential Tariff and British Preferential Tariff. Singapore has demonstrated a high level of interest with regards to the Canada-U.S. Free Trade Agreement. Because trade represents over three times its GDP, Singapore is also highly committed to multilateral trade negotiations. Canada and Singapore have renegotiated their bilateral air agreement in May 1987. Ontario, Quebec and British Columbia have opened offices in Singapore. At the present time, there are an estimated 2,000 Singaporean students in various educational institutions across Canada. The Secretary of State for External Affairs was in Singapore in June 1987 for the ASEAN Post-Ministerial Conference and since, several federal and provincial Ministers have visited Singapore. Prime Minister Lee Kuan Yew attended the Commonwealth Heads of Government Meeting in Vancouver in October 1987. While Singapore has no permanent mission in Canada, an Honorary Consul has recently been appointed (former BC Chief Justice Nathan Nemetz).

## SINGAPORE

### TRADE OVERVIEW

The economy's growth is broad-based, with the manufacturing sector leading with GDP expansion of 21.4% (first half of 1988). This includes the electronics industry which continues to be the star performer with growth of 33.5%. Forecasts for growth for 1988 as a whole are over 10%.

External trade continues to play a major role in Singapore's economic growth. Trade with Canada increased sharply in 1987 to CDN \$459.4 million with a further growth in 1988 (\$742.1 million). Singapore's continuing importance as an entrepot is measured by the fact that 35% of exports (16% of total trade) were re-exports. Canadian companies recognize the significant advantages which Singapore offers as a regional centre, with its excellent seaport, airport, telecommunications facilities, and financial infrastructure; a significant percentage of Canadian exports to Singapore are re-exported (particularly primary products and commodities).

High-valued-added industries and service sectors such as finance and banking, transport and communications, computer software and health care have the greatest prospects for future growth.

### CANADIAN MARKETING OBJECTIVES

The following sectors offer excellent potential for Canadian exporters:

1. Advanced Technology Products, and Services - With a highly skilled labour force, government and industry are focussing their efforts on exploiting the opportunities of Information Technology as a growth industry.
2. Agriculture and Food Products - Although bulk food products (grains and oil seeds) account for a high percentage of total Canadian exports to Singapore, non-bulk items present a significant opportunity for growth as a result of a growing Westernized middle class and the continuing importance of tourism.
3. Defence Programs and Products - Geo-political concerns require the maintenance of one of the region's best-equipped and trained armed forces. There are 55,000 men under arms and 150,000 reservists. An excellent market for Canadian defence products exists.
4. Transportation Systems - With 48 scheduled international air carriers and 36,033 flight arrivals in 1987, Singapore is the recognized regional aircraft service centre. Opportunities are good for increased exports of aircraft engines and parts, of avionics and simulators, and of maintenance and overhaul services.

5. Medical and Health Products and Services - Singapore is emphasizing the development of its health care industry in order to better serve its own increasingly affluent and aging population, and to further develop as a regional centre of medical excellence.

6. Oil and Gas Equipment and Services - Singapore continues to be a good market for high-tech products and services, destined for re-export. The refinery sector is operating at near capacity, and the potential is good for retrofit/replacement equipment and parts.

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**FACT SHEET - SINGAPORE**

March 1989

**Area:** 622 sq km**Population:** 2.6 million (1988)**Capital:** City State **System of Government:** Constitutional Parliamentary Democracy**Head of State:** President Wee Kim Wee **Prime Minister:** Lee Kuan Yew**Minister of Trade and Industry:** Lee Hsien Loong**Language:** English, Mandarin, Malay,  
Tamil**Ethnic Background:** Chinese 77%, Malay 15%,  
East Indian 7%**GDP:** (1987) US \$18.5 B **Per Capita Income:** US \$7,410 **Currency:** Spore Dollar = Cdn \$0.63  
**Inflation Rate:** (1988) 1.6% **Unemployment Rate:** 6.5% (1986) **Debt Service Ratio:** 0.4%**Major Trading Partners (1987):****Exports** (Total: US \$28.5 billion)

|              |         |
|--------------|---------|
| 1. USA       | \$7.0 b |
| 2. Malaysia  | \$4.0 b |
| 3. Japan     | \$2.6 b |
| 4. Hong Kong | \$1.8 b |
| 5. Thailand  | \$1.2 b |

**Imports** (Total: US \$32.5 billion)

|                 |          |
|-----------------|----------|
| 1. Japan        | \$6.6 b  |
| 2. USA          | \$4.7 b  |
| 3. Malaysia     | \$4.5 b  |
| 4. China        | \$1.4 b  |
| 5. Saudi Arabia | \$1.34 b |

**Canadian Trade Statistics:** (Cdn \$ '000s)

|         | 1986   | 1987   | 1988   |
|---------|--------|--------|--------|
| Exports | 146.3  | 168.0  | 275.2  |
| Imports | 208.3  | 291.4  | 466.9  |
| Balance | - 62.0 | -123.4 | -191.7 |

**Major Cdn Exports** (\$Cdn '000)

Precious metals, inc. alloys (35,426)  
 Other telecom. & rel. equip. (25,423)  
 Fertilizers & fert. material (23,252)  
 Nickel and alloys (22,177)  
 Newsprint paper (22,053)  
 Syn. rubber & plastic materials (17,777)

1988

**Major Cdn Imports** (\$Cdn '000)

Electronic computers (171,354)  
 Televisions, radio sets & phonographs (47,899)  
 Other telecom. & rel. equip. (32,165)  
 Air conditioning & refrig. equip. (32,065)  
 Electronic tubes & semi-conductors (30,877)  
 Misc. equipment & tools (18,095)

**Main Sectors of Opportunity for Canadian Business:**

- |                                            |                                         |
|--------------------------------------------|-----------------------------------------|
| 1. Advanced technology products & services | 4. Transportation systems               |
| 2. Agriculture & food products             | 5. Medical & health products & services |
| 3. Defence programs and products           | 6. Oil and gas equipment and services   |

**EDC Status:** on cover**CIDA Status:** not programme country**Resident Canadian Banks:** Bank of Montreal, Bank of Nova Scotia, Canadian Imperial Bank of Commerce, Royal Bank, Toronto Dominion Bank**Canadian Reps in Singapore:** High Commissioner - Sean Brady; Commercial Counsellor - Denis Comeau; Tel: (011-65) 225-6363; Telex: (Destination Code 87) RS21277; Fax: (011-65) 225-2450**Department of External Affairs/PST Trade Contact:** Roman Hruby (613) 995-7659; Telex: 053-3745; Fax: (613) 996-9510**Singapore Reps in Canada:** High Commissioner - Chan Heng Chee, contact should be made via Singapore Permanent Mission in New York, Tel: (212) 826-0840**Commercial Reps** - Lim Chin Geok, Toronto, Ontario, Tel: (416) 363-8227- Ng Che Meng, Vancouver, B. C., Tel: (604) 662-7055

MAJOR CANADIAN EXPORTS TO SINGAPORE

(\$'000s)

|                                          | <u>1987</u>    | <u>1988</u>    |
|------------------------------------------|----------------|----------------|
| Precious metals, including alloys        |                | 35,426         |
| Other telecommunication & rel. equip.    |                | 25,423         |
| Fertilizers and fertilizer material      |                | 23,252         |
| Nickel and alloys                        |                | 22,177         |
| Newsprint paper                          |                | 22,053         |
| Syn. rubber and plastic materials        |                | 17,777         |
| Other paper                              |                | 7,519          |
| Zinc, including alloys                   |                | 6,799          |
| Other end products                       |                | 6,722          |
| Other oil seeds, oil nuts & oil kernels  |                | 6,691          |
| Nickel in ores, concentrates & scrap     |                | 6,559          |
| Office machines and equipment            |                | 6,104          |
| Sulphur                                  |                | 6,023          |
| Special transactions, trade              |                | 5,717          |
| Other personal and household goods       |                | 4,801          |
| Paperboard                               |                | 4,302          |
| Motor vehicle parts, except engines      |                | 3,836          |
| Engines and turbines, gen. purpose       |                | 3,682          |
| Aircraft engines, except engines         |                | 3,132          |
| Other motor vehicles                     |                | 2,833          |
| Trucks, truck tractors and chassis       |                | 2,732          |
| Drilling, excavating, mining mach.       |                | 2,651          |
| Metalworking machinery                   |                | 2,509          |
| Elect. lighting and dist. equipment      |                | 2,323          |
| Oth. measur. cont. lab. med. & opt. eqp. |                | 2,298          |
| Organic chemicals                        |                | 2,270          |
| Woodworking machinery and equipment      |                | 2,135          |
| Other gen. purpose industrial mach.      |                | 1,895          |
| Metal fabricated basic products          |                | 1,764          |
| Other paper for printing                 |                | 1,649          |
| Photographic goods                       |                | 1,632          |
| Television, radio sets & phonographs     |                | 1,624          |
| Aircraft, engines and parts              |                | 1,560          |
| Wood pulp and similar pulp               |                | 1,525          |
| Other special industry machinery         |                | 1,401          |
| Other equipment and tools                |                | 1,372          |
| Vegetables and vegetable preparations    |                | 1,276          |
| Heating and refrigeration equipment      |                | 1,215          |
| Other fabricated materials inedible      |                | 1,061          |
| Hand tools and misc. cutlery             |                | <u>1,003</u>   |
| Sub-Total                                |                | 256,723        |
| of                                       |                | <hr/>          |
| Total                                    | <u>167,992</u> | <u>275,218</u> |

MAJOR CANADIAN IMPORTS FROM SINGAPORE  
(\$'000s)

|                                       | <u>1987</u>    | <u>1988</u>       |
|---------------------------------------|----------------|-------------------|
| Electronic computers                  |                | 171,354           |
| Televisions, radio sets & phonographs |                | 47,899            |
| Other telecommunication & rel. equip. |                | 32,165            |
| Air conditioning & refrig. equip.     |                | 32,065            |
| Electronic tubes & semi-conductors    |                | 30,877            |
| Miscellaneous equipment and tools     |                | 18,095            |
| Organic chemicals                     |                | 15,588            |
| Telephone and telegraph equipment     |                | 15,197            |
| Outerwear, except knitted             |                | 10,596            |
| Games, toys and children's vehicles   |                | 10,037            |
| Outerwear, knitted                    |                | 9,990             |
| Other office machines and equipment   |                | 7,013             |
| Fish and marine animals               |                | 6,112             |
| Switchgear and protective equipment   |                | 5,605             |
| Man-made fibre yarn and thread        |                | 4,539             |
| Furniture and fixtures                |                | 4,048             |
| Other transportation equipment        |                | 3,697             |
| Ships, boats and parts, except eng.   |                | 2,918             |
| Other crude animal products           |                | 2,828             |
| Pumps, except oil well pumps          |                | 2,581             |
| Tin, including alloys                 |                | 2,526             |
| Stationer's and office supplies       |                | 2,403             |
| Other wood fabricated materials       |                | 2,054             |
| Other measuring, lab. equip., etc.    |                | 1,616             |
| Drilling machinery and drill bits     |                | 1,595             |
| Books and pamphlets                   |                | 1,489             |
| Other foods and materials for foods   |                | 1,389             |
| Coffee                                |                | <u>1,323</u>      |
| Sub-Total                             |                | 447,599           |
| of                                    |                | <u>          </u> |
| Total                                 | <u>291,407</u> | <u>466,938</u>    |

Note: Imports shown are based on country of origin. However, prior to 1988, imports were published based on country of consignment/export.

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THAILAND

## THAILAND

### GENERAL INFORMATION

Thailand is a country of 54.7 million people located at the crossroads of Southeast Asia. Eighty-five percent of the population lives in rural areas, and over 90% are Buddhist, 3% Muslim and less than 1% Christian. It is a constitutional monarchy under one of the world's oldest surviving dynasties.

### POLITICAL AND ECONOMIC SITUATION

Thailand has enjoyed increasing internal stability since 1977 as successive governments have created an efficient, modern, civilian administration. Economic and development progress has been fairly consistent and sustained as both the government and military have followed the King's inspirational lead in this area. In 1988, the King became the longest serving monarch in the Chakri dynasty: 1989 marks His Majesty's 44th year on the throne.

Following general elections held in July, retired Major General Chatichai Choonhavan was selected to head a new coalition government. He is the first Member of Parliament to become Prime Minister since 1976. His predecessor, General Prem Tinsulanonda, was an appointed Prime Minister. He had led five successive coalition governments since 1980. Prime Minister Chatichai has indicated he would continue the same basic policies promoted by the previous administration. He has underlined the increasing role that should be played by the private sector in national economic development.

From 1974 to 1984, the Thai economy was one of the more resilient in Asia, with an average 7% growth in the annual GDP rate. Following a temporary downturn in 1985-86, the economy bounced back, registering significant gains in several areas. Real GDP growth reached 6% in 1987. Growth is expected to reach 10% in 1988, with manufactured exports (a 24% increase is expected over 1987) and tourism leading the way. The Thai Sixth Five Year Plan approved October 1, 1986 places emphasis on adding value to the resource base.

### FOREIGN POLICY ORIENTATIONS

Thailand leans strongly to the West in its foreign policy. Relations with Western countries have benefited from international concern for Thailand's security in the face of Vietnamese pressure and Thailand's generous response to the Indochinese refugee exodus. ASEAN is a cornerstone of Thai foreign policy. As Thailand's domestic economy has become more directly affected by international economic developments, its foreign policy has placed more emphasis in this area and in balancing Thai relations with all superpowers. Thailand has been an active and moderating voice in the Group of 77 and it has

played a constructive role in international commodity fora and the GATT Uruguay Round. Thailand is also a co-founder of the "G-14 Cairns Group" of fair agricultural traders.

#### CANADA/THAILAND RELATIONS

Canada's interest in Thailand dates from Canadian participation in the Indochina Control Commissions and the Colombo Plan in the 1950's. Relations have broadened over the years with Canada's increased interest in the region. Thailand was Canada's dialogue co-ordinator with ASEAN 1985-1988. During this period, the Canada-ASEAN dialogue gained new momentum due very much to Thai initiative and assistance. Canada has accepted over 110,000 refugees from Indochina since 1979, of which over 37,000 have come from camps in Thailand.

Total Canadian exports to Thailand in 1988 were up 32.8% from 1987, totalling \$259 million; imports totalled \$343.4 million, representing an increase of 64%. Trade between Canada and Thailand is carried out under the GATT. Total trade in 1988 reached \$602.4 million. The Thai government announced in late 1988 that Lavalin's bid for the construction of the \$2.02 billion Bangkok Mass Rapid Transit system had been selected. This will have a significant impact on Canada-Thai relations and bodes well for Canada's reputation worldwide.

Thailand is a beneficiary of Canada's General Preferential Tariff. A Foreign Investment Insurance Agreement was signed in January, 1983 and a Double Taxation Agreement in April 1, 1984. Thailand is a designated target country under the Asia Pacific component of the government's National Trade Strategy. An Economic Cooperation Agreement was signed during the SSEA's visit in July 1988. Direct air links began with CAIL service to Bangkok in October, 1987, and Thai International service to Toronto in July, 1988. A new air services agreement which expands a bilateral accord negotiated in 1986 was reached by Canada and Thailand in October 1988.

The aid program in Thailand has recently been increased to \$150 million over the next five years. A substantial portion of bilateral development assistance is directed to technical assistance and industrial cooperation under the "Enterprise Thailand" Program.

There have been several major visits between our two countries, including the Crown Prince's visit to Canada in 1986 and Governor-General Sauve's visit to Thailand in 1987. The Secretary of State for External Affairs also visited Thailand in July 1988 to attend the ASEAN PMC Meeting in Bangkok. There are approximately 300 Thai students in Canada.

## THAILAND

### TRADE OVERVIEW

Thailand's current economic boom continues to defy all projections - export growth projected at 35% in 1988, GDP growth is estimated to be 9.5%; domestic and foreign investment accelerating rapidly - however constraints in the capital structure, labour markets, and particularly in the public infrastructure may slow growth rate in 1989. The newly elected coalition government must now address the task of dismantling policies that made sense a few years ago but which are no longer relevant. There are also symptoms of economic overheating, as consumer and production prices increased by 5.5% and 10.6% respectively so far in 1988. The RTG's 1989 fiscal year budget, which includes a 30% increase in investment expenditures over 1988, will allow the government to accelerate infrastructure expansions.

Forecasts call for lower (7.5%) economic growth in 1989, in part due to an anticipated drop in agricultural sector expansion, while exports are expected to continue their growth. Competition will grow, and enhanced market penetration will become more difficult. Concerns have been expressed that 1988 import levels are also exceeding all expectations at 44% for 1988, up from initial forecasts in the 14% range. It is generally felt that the increase reflects a dramatic jump in demand for capital goods needed to fuel the boom.

Canada-Thai two-way trade reached \$602.4 million in 1988. Raw materials continue to dominate Canada's exports to Thailand, however, breakthroughs in the defence, telecom, mass transmit, and other hi-tech sectors suggest a need to focus more promotional activities in those areas. On-going support in the mining, oil and gas, and power sectors will continue. In line with Thailand's own changing needs, good opportunities exist in infrastructural projects on a BOT basis or on a consulting basis.

A striking feature of Thailand's 1988 exports to Canada are the Thai-Mitsubishi cars for Chrysler Canada. As Japan increases its presence in Thailand, it is likely that we will see more "re-directed Japanese products" coming into Canada from Thailand. This could open up new sales and joint venture opportunities for Canada.

The effects of sound economic and monetary policies which, inter alia, will reduce Thailand's debt service ratio to about 17% in 1989, and the reduction in public debt due to growing government revenues in 1988 are considered major breakthroughs. If this momentum is maintained, Thailand can look forward to self-sustaining growth in the coming years after many years of major economic imbalances. The reversal of its fortunes since 1986, backed by a solid entrepreneurial class and a worldwide focus, suggest that opportunities will continue to develop for Canada. The signing of the Economic Co-operation Agreement in 1988 provides a framework under which this can take place.

## CANADIAN MARKETING OBJECTIVES

1. Communications and Informatics - Thailand will spend around \$300 million on telecommunications in the next four years. The Thai telecommunications market is a priority sector of the new Sixth Five Year Plan (1987-1991).
2. Transportation Systems - The Bangkok Mass Rapid Transit System, State Railway of Thailand expansion, CNG bus engine opportunities, and Royal Thai Government proposed acquisition of aircraft, all contribute to buoyant prospects in the transportation sector. Civilian airports of Bangkok, Chiangmai, and Phuket will be upgraded in next two to three years.
3. Defence - The Defence Sector continues to receive the lion's share of the annual Thai budget. Procurement windows exist for de Havilland Aircraft, Canadair CL215, Airborne Surveillance Radar Systems, M-41 Tank Retro-fits, Pratt and Whitney engines, radio equipment (especially for the police), and further simulator sales for helicopters.
4. Power Equipment and Services - Thailand will double the existing 6 000 megawatts of installed electricity generating capacity by the end of the century. The discovery of New Lignite Coal Deposits in Southern Thailand has created additional opportunity for power generating equipment.
5. Petrochemicals - The Eastern Seaboard Project is forging ahead in the development of the National Petrochemical Complex. Many opportunities for Canadian suppliers exist there, plus pipeline opportunities throughout Thailand.

## TRADE CONTACTS

Mr. Robert Vanderloo  
Counsellor (Commercial) and Consul  
Canadian Embassy  
The Boonmitr Building  
138 Silom Road, 11th Floor  
P.O. Box 2090  
Bangkok 5, Thailand

Telephone: (011-66-2) 234-1561/8  
Telex: (Destination Code 86)  
82671 (82671 DOMCAN TH)  
Fax: (011-66-2) 236-6463

Mr. Alan D. McBride  
Desk Officer - Thailand  
Asia Pacific South Trade  
Development Division (PST)  
Department of External Affairs  
L.B. Pearson Building  
125 Sussex Drive  
Ottawa, Ontario  
K1A 0G2

Telephone: (613) 992-0959  
Telex: 053-3745  
Fax: (613) 996-9510

**FACT SHEET - THAILAND**

March 1989

**Area:** 513,115 km<sup>2</sup>**Population:** 54.7 million (1988 approx)**Capital:** Bangkok (Krung Thep)**System of Government:** Constitutional Monarchy**Head of State:** HM King Bhumibol Adulyadej (Rama IX)**Prime Minister:** Chatichai Choonhavan**Minister of Commerce:** Subin Pinkhayan**Language:** Thai/Chinese**Ethnic Background:** Thai 80%; Chinese 10%; Malay 3%; Other 7%**GDP:** 1987-US \$46.6 B**Per Capita Income:** US \$870  
(1987)**Currency:** Baht (100 Satang)  
Cdn \$1 = approx 21.30 baht**Inflation Rate:** 3.9% (1988) **Debt Service Ratio:** (1987) 17% **Unemployment Rate:** 6.8% (1987)**Major Trading Partners (1987):****Exports** (Total: US \$11.3 billion)

1. USA (\$2.1 b)
2. Japan (\$1.7 b)
3. Singapore (\$1.0 b)
4. Netherlands (\$0.73 b)
5. Germany (\$0.55 b)

**Imports** (Total: US \$13.0 billion)

1. Japan (\$3.4 b)
2. USA (\$1.6 b)
3. Singapore (\$1.0 b)
4. Germany (\$0.77 b)
5. Malaysia (\$0.52 b)

**Canadian Trade Statistics: (Cdn \$ millions)**

|         | 1986   | 1987   | 1988   |
|---------|--------|--------|--------|
| Exports | 105.3  | 194.9  | 259.0  |
| Imports | 161.5  | 209.8  | 343.4  |
| Balance | - 56.2 | - 14.9 | - 84.4 |

**Major Cdn Exports 1988 (Cdn \$'000)**

|                                 |          |
|---------------------------------|----------|
| Aluminum, including alloys      | (39,707) |
| Asbestos, unmanufactured        | (28,079) |
| Wood pulp & similar pulp        | (26,117) |
| Syn. rubber & plastic materials | (18,588) |
| Organic chemicals               | (17,194) |
| Plate, sheet & strip, steel     | (17,194) |

**Major Cdn Imports 1988 (Cdn \$'000)**

|                                 |          |
|---------------------------------|----------|
| Fish & marine animals           | (76,089) |
| Passenger automobiles & chassis | (74,036) |
| Outerwear, except knitted       | (19,079) |
| Outerwear, knitted              | (18,019) |
| Electronic computers            | (15,720) |
| Fruits and products, canned     | (13,907) |

**Main Sectors of Opportunity for Canadian Business:**

1. communications
2. transportation
3. defence
4. power equipment and services
5. petrochemicals

**EDC Status:** On cover**CIDA Status:** CORE country (Category I)**Resident Canadian Bank:** Bank of Nova Scotia, Bangkok - Robert Rayner**Canadian Reps in Thailand:** Ambassador - Lawrence Smith; Commercial Counsellor - Robert Vanderloo; Telex: 82671 DOMCAN TH; Tel: (011-66-2) 234-1561/8; Fax: (011-66-2) 236-6463**Department of External Affairs/PST Trade Contact:** Alan McBride, Tel: (613) 992-0959, Fax: (613) 996-9510; Telex: 053-3745**Thailand Reps in Canada:** Ambassador - Chawat Arthayukti (Ottawa); Tel: (613) 722-4444  
Commercial reps: Ottawa, Toronto, Montreal, Edmonton, and Vancouver

MAJOR CANADIAN EXPORTS TO THAILAND  
(\$'000s)

|                                          | <u>1987</u>    | <u>1988</u>    |
|------------------------------------------|----------------|----------------|
| Aluminum, including alloys               |                | 39,707         |
| Asbestos, unmanufactured                 |                | 28,079         |
| Wood pulp and similar pulp               |                | 26,117         |
| Syn. rubber and plastic materials        |                | 18,588         |
| Organic chemicals                        |                | 17,194         |
| Plate, sheet and strip, steel            |                | 13,500         |
| Newsprint paper                          |                | 12,851         |
| Heating and refrigeration equipment      |                | 12,061         |
| Oth. measur. cont. lab. med. & opt. eqp. |                | 11,219         |
| Crude petroleum                          |                | 9,969          |
| Wheat                                    |                | 7,211          |
| Scrap iron and steel                     |                | 6,640          |
| Primary iron and steel                   |                | 6,633          |
| Fish, canned                             |                | 4,531          |
| Sulphur                                  |                | 4,331          |
| Other telecommunication & rel. equip.    |                | 3,307          |
| Textile and related fibres               |                | 3,278          |
| Other paper                              |                | 2,694          |
| Dairy produce, eggs and honey            |                | 2,538          |
| Hand tools and misc. cutlery             |                | 2,340          |
| Bars and rods, steel                     |                | 2,271          |
| Office machines and equipment            |                | 2,015          |
| Other agric. mach. and equipment         |                | 1,306          |
| Other fishery foods and feeds            |                | 1,288          |
| Other iron and steel and alloys          |                | 1,238          |
| Other textile fabricated materials       |                | 1,201          |
| Other equipment and tools                |                | <u>1,021</u>   |
| Sub-Total                                |                | 243,128        |
| of                                       |                | <hr/>          |
| Total                                    | <u>194,929</u> | <u>259,028</u> |

MAJOR CANADIAN IMPORTS FROM THAILAND  
(\$'000s)

|                                         | <u>1987</u>    | <u>1988</u>    |
|-----------------------------------------|----------------|----------------|
| Fish and marine animals                 |                | 76,089         |
| Passenger automobiles and chassis       |                | 74,036         |
| Outerwear, except knitted               |                | 19,079         |
| Outerwear, knitted                      |                | 18,019         |
| Electronic computers                    |                | 15,720         |
| Fruits and products, canned             |                | 13,907         |
| Other cereals and cereal preparations   |                | 13,113         |
| Other end products, inedible            |                | 9,039          |
| Electronic tubes & semi-conductors      |                | 8,179          |
| Watches, clocks, jewellery & silverware |                | 7,158          |
| Other apparel and apparel access.       |                | 6,881          |
| Footwear                                |                | 6,544          |
| Furniture and fixtures                  |                | 6,097          |
| Broad woven fabrics, mixed fibres       |                | 4,430          |
| Pipes and tubes, iron and steel         |                | 4,157          |
| Other yarn and thread                   |                | 3,918          |
| Natural and synthetic gem stones        |                | 3,623          |
| Other vegetables & vegetable prep.      |                | 3,413          |
| Rubber and allied gums, natural         |                | 3,053          |
| Kitchen utensils, cutlery tableware     |                | 2,917          |
| Games, toys and children's vehicles     |                | 2,799          |
| Other fruit juices and concentrates     |                | 2,641          |
| Coffee                                  |                | 2,509          |
| Man-made fibre yarn and thread          |                | 2,458          |
| Other fodder and feed                   |                | 2,446          |
| Other personal and household goods      |                | 2,415          |
| Other fruits and fruit preparations     |                | 2,337          |
| Broad woven fabrics, cotton             |                | 1,932          |
| Other foods and materials for foods     |                | 1,664          |
| Compressors, blowers & vacuum pumps     |                | 1,658          |
| House furnishings                       |                | 1,465          |
| Leather and leather fabricated mat.     |                | 1,344          |
| Other fresh fruits and berries          |                | 1,222          |
| Pipe fittings                           |                | 1,180          |
| Fruits, dried or dehydrated             |                | 1,171          |
| Stationer's and office supplies         |                | <u>1,078</u>   |
| Sub-Total<br>of                         |                | <u>329,691</u> |
| Total                                   | <u>209,763</u> | <u>343,458</u> |

Note: Imports shown are based on country of origin. However, prior to 1988, imports were published based on country of consignment/export.

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ASIAN DEVELOPMENT BANK

## ASIAN DEVELOPMENT BANK

The Asian Development Bank (AsDB), headquartered in Manila, has lending commitments of over \$2 Billion annually to promote the economic and social progress of its developing member countries (DMC's) in the Asia Pacific Region. The Bank provides loans and technical assistance to borrowing countries for projects covering a wide range of sectors including agriculture, energy, social infrastructure, transportation and communications, and industry and non fuel minerals. As such, the AsDB-funded market offers tremendous opportunities for Canadian exporters.

### PROCUREMENT OF EQUIPMENT, CIVIL WORKS AND RELATED SERVICES

In 1987, Executing Agencies (Bank borrowers) in the region spent over US \$1.22 billion for the procurement of goods, related services and civil works for several hundred on-going AsDB-funded projects. Approximately 71% of AsDB funded procurement is conducted under international competitive bidding (ICB) procedures. It is important to note that the Executing Agency in the borrowing country has responsibility for the selection of suppliers for AsDB loans, and not the Bank itself. In 1987 Canadian suppliers won 24 of the 29 contracts they bid on for a total of US \$9.10M. While this figure represents a market share of less than 1%, there is ample opportunity for Canadian manufacturers and suppliers to increase their share of AsDB procurement.

### CONSULTING SERVICES

Consulting firms or individuals can be recruited directly by the Bank for Technical Assistance (TA) projects, or by the Executing Agencies using AsDB project funds (loans). The performance of Canadian firms or individuals under both categories (TA, Loans) ranks fourth among member countries capturing an average market share of between 5.6-7.5% annually.

**Technical Assistance** - The Bank provides technical assistance by making available the services of consultants for missions associated with project preparation, project implementation, or advisory assistance to its DMC's. In 1987 the Bank approved 141 TA grants totalling US \$42 million, and a substantial increase in the TA program is expected over the next few years. In order to be seriously considered for the eventual shortlist of 5-7 invited firms, interested Canadian companies must: be registered with the Bank's Consulting Services Division; express interest in the project in writing to the responsible project officers; and, convince Bank officials that the firm is capable of carrying out the project.

Loans - In 1987, a total of US \$79.4 million was spent by Executing Agencies for the procurement of consulting services, principally for project supervision and detailed design and engineering. The Executing Agency is responsible for the selection of the winning firms.

#### SOURCES OF INFORMATION

While the AsDB publication "Proposed Projects and Contracts Awarded" (PPCA) provides a brief sketch of the proposed pipeline of Bank-financed projects, the information in the PPCA is neither timely nor comprehensive enough for interested Canadian suppliers. The most useful and timely information on procurement plans can only be obtained in advance directly from the AsDB project officer, from the Canadian Embassies in Manila and in the region, and most importantly through continuous contact with the Executing Agency. Apart from direct sources, procurement information such as equipment specifications and date of tender issues can eventually be found in the United Nations publication "Development Business" which is published fortnightly. However, if a supplier relies exclusively on "Development Business" as a source of procurement information, the company's marketing efforts will largely be futile.

#### SERVICES AVAILABLE TO CANADIANS

**Ottawa:** The Asia-Pacific South Trade Development Division, Department of External Affairs, Ottawa, (613-995-7680) can provide Canadian companies with general information related to overall Bank activities, lending modes and procurement guidelines. Copies of AsDB loan documents are available (on loan) from the Department of External Affairs Library in Ottawa (613-992-6150).

**Manila:** The AsDB Liaison office in the Canadian Embassy in Manila can provide specific program or project information including details on proposed projects such as: project scope, timing, man-month requirements for consulting services, equipment requirements, names of relevant AsDB and Executing Agency officials, and other market intelligence. As well (upon request) Canadian firms can receive copies of project appraisal reports.

**Regional:** Canadian Embassies or High Commissions in the relevant beneficiary countries can help Canadian firms to establish links with Executing Agencies in their respective territories through identification of potential agents, or assist in building a personal relationship with the customer, a vital element in doing business in this part of the world. The services of the Regional Trade Commissioners range from marketing assistance to tender preparation advice.

ASIAN DEVELOPMENT BANK PRIME CONTACTS

**AsDB Address**

Asian Development Bank  
2330 Roxas Blvd.  
Metro Manila  
Philippines

|                 |                                                          |
|-----------------|----------------------------------------------------------|
| Postal Address: | P.O. Box 789 Manila<br>Philippines 2800                  |
| Telephone:      | 834-4444<br>(011-63-2) 711-3851<br>(International calls) |
| Facsimile:      | (011-63-2) 741-7961                                      |
| Cable Address:  | ASIANBANK MANILA                                         |
| Telex:          | 23101 ADB PH<br>63587 ADB PN<br>40571 ADB PM             |

**AsDB Liaison Officer - Manila**

Canadian Embassy  
9th floor, Allied Bank Center  
6754 Ayala Avenue, Makati  
Metro Manila  
Philippines 3117

|                  |                                                                                         |
|------------------|-----------------------------------------------------------------------------------------|
| Mailing Address: | P.O. Box 971 Makati Central<br>Post Office, Makati, Metro<br>Manila<br>Philippines 3117 |
|------------------|-----------------------------------------------------------------------------------------|

|            |                                                  |
|------------|--------------------------------------------------|
| Cable:     | DOMCAN MANILA                                    |
| Telephone: | (011-63-2) 815-9536 to 41                        |
| Telex:     | (Destination code 75) 63676<br>(63676 DOMCAN PN) |

**AsDB Liaison Officer - Ottawa**

Louise Branch  
Asia Pacific South  
Trade Development Division (PST)  
Department of External Affairs  
125 Sussex Drive  
Ottawa, Ontario  
K1A 0G2

|            |                |
|------------|----------------|
| Telephone: | (613) 995-7680 |
| Facsimile: | (613) 996-9510 |
| Telex:     | 053-3745       |

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FEDERAL GOVERNMENT SUPPORT TO EXPORTERS:

- PROGRAM FOR EXPORT MARKET DEVELOPMENT
- INTERNATIONAL TRADE CENTRES
- CIDA INDUSTRIAL COOPERATION PROGRAM
- CIDA REGIONAL CANADA-ASEAN CENTRE
- EXPORT DEVELOPMENT CORPORATION

## PROGRAM FOR EXPORT MARKET DEVELOPMENT

The main objective of the Program for Export Market Development (PEMD) is to increase export sales of Canadian goods and services. The program accomplishes this by sharing the costs of activities that companies normally could not, or would not undertake alone, to reduce the risks involved in penetrating a foreign market. PEMD encourages Canadian companies not previously involved in exporting to become exporters. PEMD also encourages existing Canadian exporters to enter new geographic markets and new product markets. The PEMD program can be accessed through the International Trade Centres (ITC's) across Canada.

### KINDS OF ASSISTANCE AVAILABLE

The Program offers Canadian businesses financial assistance to undertake or participate in various types of trade promotion activities. All activities must be commercially oriented; that is, they must focus on generating export sales. These activities are categorized as either industry-initiated or government-planned.

#### Industry-Initiated Activities are:

- ° participating in recognized trade fairs outside Canada;
- ° visits outside Canada to identify markets;
- ° visits of foreign buyers to Canada;
- ° project bidding for specific projects outside Canada involving international competition/formal bidding procedures;
- ° the establishment of permanent sales offices abroad (excluding the U.S.) in order to undertake sustained marketing efforts in an area where the applicant is currently active;
- ° marketing agreements aimed at medium-sized companies experienced in exporting;
- ° special activities for non-profit, non-sales food, agriculture and fish organizations, marketing boards and agencies (for the benefit of their members).

#### Government-planned activities are:

- ° trade missions to markets outside Canada and for foreign business persons and government officials coming to Canada or to trade shows where Canadian business participation is substantial; trade fairs abroad. Participation is by Government invitation.

## INTERNATIONAL TRADE CENTRES

The federal government has allocated \$7.2 million over the next five years for the International Trade Centres (ITC's), to be located within the provincial offices of the new Department of Industry, Science and Technology Canada (ISTC).

These centres will offer a full range of trade services including export counselling, the provision of market opportunity information and the administration of the Program for Export Market Development (PEMD). An important element is the World Information Network for Exports (WIN) system which provides key information on Canadian companies along with details of their trade activities. The Department of External Affairs' 102 trade offices around the world rely on this computerized directory of Canadian exporters for information about Canadian capabilities to match with market opportunities.

In a move to provide more comprehensive export services to business communities across Canada, the Export Development Corporation will relocate its regional offices to the Centres once current leases expire. As well, the future regional operations of CIDA's Business Cooperation Program will be located within selected ITCs, effectively consolidating key Federal departments and agencies for easy access for Canadian exporters.

The ITCs will be backed up by traditional support material such as foreign country market profiles and analytical material on such topics as agents, trading houses, cross-licensing and joint ventures. As well, DEA/ISTC information data bases will make business persons aware of trade fair opportunities, outgoing missions to foreign countries and incoming buyers' missions from abroad.

For the list of ITC locations across Canada and Trade Commissioner contacts in each location, please see the section on Federal Government Contacts across Canada.

## HOW TO GET FINANCIAL SUPPORT FROM CIDA-INC

The objective of CIDA's Industrial Cooperation Program (CIDA-INC) is to produce "developmental impact" in the developing countries in order to help them with their plans to develop economically and socially.

CIDA-INC has several mechanisms which can help the Canadian private sector contribute to that objective, most notably the Canadian Project Preparation Facility (CPPF) and mechanisms in support of investment.

The CPPF is used mainly for pre-feasibility studies by consultants who hope to obtain contracts with agencies other than CIDA for full-fledged feasibility studies on capital projects in ASEAN countries. These consultants also hope to identify opportunities for other Canadian suppliers to compete for goods and service contracts financed by untied funds committed by International Financing Institutions (IFI).

Projects CIDA-INC supports will help:

- to create employment in the target countries (especially for women);
- to generate the target countries' foreign exchange through import substitution;
- to create incremental demand for locally produced goods and services;
- to produce a favourable ecological impact in the target countries (i.e. reducing pollution);
- to increase the ability of the governments of the target countries to finance their development program by re-enforcing their tax base, and so on.

If you want to establish a joint venture (a manufacturing joint venture or a service joint venture), to license your technology, to set up some kind of co-production agreement or to establish some other arrangement which benefits both you and one or more of the target countries, you can obtain up to \$365,000 from CIDA-INC:

- up to \$15,000 towards the costs of your initial discussions (Starter Study);
- up to \$100,000 towards the costs of reaching a written agreement which is acceptable to you, your investment partner and the investment coordinating authorities in the host country (Viability Study);
- up to \$250,000 to consolidate the technology transfer (Project Support).

To obtain these contributions, you must make a written proposal to CIDA-INC. Your proposal must provide complete answers to all of the following questions:

- who is the company making the application, supported by the CIDA-INC applicant information questionnaire (obtain it from Lance Bailey at (819) 997-0565 or Rick McTaggart at (819) 997-0562) and your most recent financial statement;

- what do you propose to do, and with whom, providing the appropriate narrative and a budget in three columns to show what you propose to contribute to each item of the costs, what your prospective partner can be expected to contribute and what you expect CIDA to contribute;
- how your proposed activity will contribute to the economic and social development of the host country; and
- why the Canadian tax-payer should be expected to contribute (basically, how your activity will lead to employment creation, foreign exchange generation, increased security of strategic imports, and so on, in Canada).

CIDA-INC is also contributing towards costs of maintaining Canadian investment advisers in the Malaysian Industrial Development Authority (MIDA) in Kuala Lumpur and in Badan Koordinasi Penanaman Modal (BKPM) in Jakarta.

POSSIBLE CONTRIBUTIONS BY CIDA-INC

(updated January 31, 1989)

|                                                                                                | <u>Starter<br/>Study</u>       | <u>Viability<br/>Study</u>         | <u>Project<br/>Support</u>  | <u>Canadian Project<br/>Preparation Facility</u> |
|------------------------------------------------------------------------------------------------|--------------------------------|------------------------------------|-----------------------------|--------------------------------------------------|
| <u>Pre-<br/>requisite</u>                                                                      | <u>Prospective<br/>Partner</u> | <u>Letter of<br/>Intent</u>        | <u>Formal<br/>Agreement</u> | <u>Evidence of<br/>Downstream Funding</u>        |
| Air fares<br>up to full<br>economy rates                                                       | Yes                            | 100% to IDC's<br>50% from<br>IDC's | Yes                         | Yes                                              |
| Per diems in<br>host country<br>at \$150.                                                      | Yes                            | Yes                                | Yes                         | Yes                                              |
| Per diems in<br>Canada at<br>\$141.                                                            | Yes                            | 50%                                | Yes                         | When necessary                                   |
| Consultants'<br>services:<br>mkt anal's,<br>engineers,<br>chartered<br>accountants,<br>lawyers | No                             | 50%                                | No                          | When necessary                                   |
| Costs of your<br>own time                                                                      | No                             | No                                 | No                          | Up to maximum of<br>\$500/day                    |
| Maximum CIDA<br>contribution                                                                   | \$15K                          | \$100K                             | \$250K                      | \$350K                                           |
| Chartered<br>Accountant's<br>certificate<br>required                                           | Yes                            | Yes                                | Yes                         | Yes                                              |
| Original<br>receipts<br>required                                                               | No                             | No                                 | No                          | No                                               |
| Desired                                                                                        | Letter of<br>Intent            | Formal<br>Agreement                | Profits                     | Recommendations to<br>your client                |

## CIDA REGIONAL CANADA ASEAN CENTRE

On June 20, 1987 the Secretary of State for External Affairs, the Right Honorable Joe Clark, announced at the ASEAN Post Ministerial Conference in Singapore that Canada's Development Cooperation Program with ASEAN would be enlarged and given new focus and direction.

In support of this initiative and in keeping with the recommendations of a Canadian parliamentary committee study of CIDA the Canadian Government will establish a CANADA-ASEAN Centre in Singapore which will provide a stronger Canadian presence and a greater focus for CIDA's Regional Programs

The CANADA-ASEAN Centre is part of the Canadian Government's efforts to decentralize CIDA's operations to the field. The Centre, which will be located in Singapore adjacent to Canada's High Commission, is expected to be completed by May 1989.

The Centre will initially focus its activities on managing CIDA's ASEAN and Regional Institutions Programs. Officers of the Centre will work closely with Canada's diplomatic representatives in the Region and will provide a resource to their missions beyond their present capacity. As the Centre becomes fully operational its mandate will be enlarged to satisfy a broader range of Canadian interests. The broad purpose of the Centre would be to facilitate the building of linkages and institutional relationships between ASEAN countries and Canada. It is expected that the priority areas following development cooperation would be human resource development, institutional cooperation (particularly among educational establishments), and business cooperation.

## EXPORT DEVELOPMENT CORPORATION

The Export Development Corporation (EDC) is Canada's official export credit agency, responsible for providing export credit insurance, loans, guarantees, and other financial services to promote Canadian export trade.

EDC has export insurance programs to: protect you against non-payment by foreign buyers; protect your foreign investment, protect domestic suppliers to Canadian exporters against non-payment; and to protect members of a Canadian export consortium against a loss caused by the non-performance of a partner.

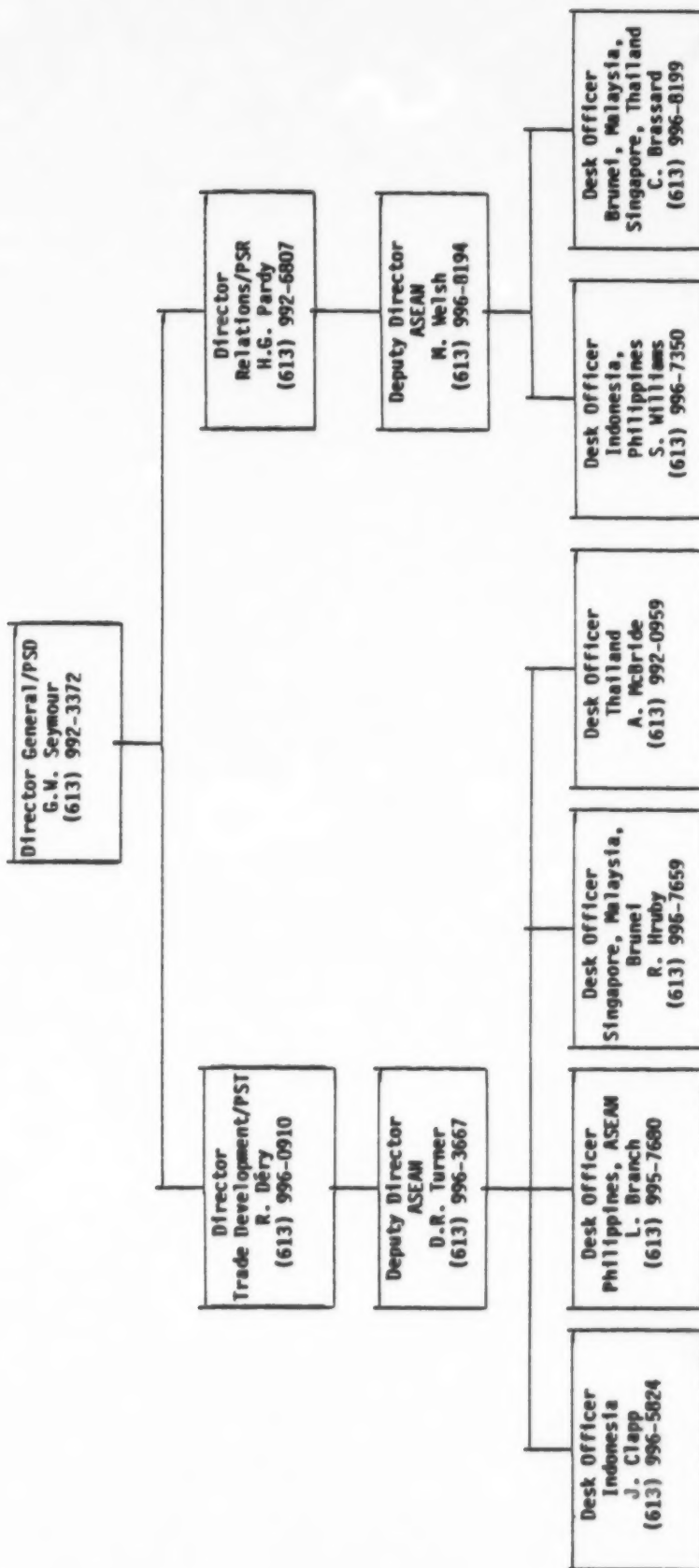
With export financing, EDC lends to foreign buyers so they can afford to purchase Canadian exports, and pays the exporter, directly in cash. Also, the corporation makes it easier for exporters to get private sector financial backing, by providing loan, performance, and bid bond guarantees, which eliminate the risks for the financial institution providing the direct support.

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USEFUL CONTACTS

- FEDERAL GOVERNMENT CONTACTS ACROSS CANADA  
(DEA, ITCS, CIDA, EDC)
- CANADIAN TRADE COMMISSIONERS IN ASEAN
- CANADIAN PRIVATE SECTOR CONTACTS
- ASEAN TRADE CONTACTS IN CANADA

DEPARTMENT OF EXTERNAL AFFAIRS  
ASIA PACIFIC SOUTH BUREAU



## INTERNATIONAL TRADE CENTRES

### VANCOUVER

International Trade Centre  
Industry, Science and Technology Canada  
P.O. Box 11610  
900-650 West Georgia Street  
Vancouver, British Columbia  
V6B 5H8

#### Contact:

Mr. Zen Burianyk  
Senior Trade Commissioner

Tel: (604) 666-1438  
Telex: 04-51191  
Fax: (604) 666-8330

### EDMONTON

International Trade Centre  
Industry, Science and Technology Canada  
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